

Acquisition Strategy and Request For Proposal (RFP) Development/Source Selection Overview

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(ACE)
HQ SMC/AXD
DSN 833-5495 or (310) 363-**

Overview Part 1

- Purpose of Session (Outcomes)
 - DODD 5000.1 and DODI 5000.2
 - National Security Space Acquisition (NSSA) Policy 03-01
 - ✓ Defense Space Acquisition Board (DSAB) Process



Requirements

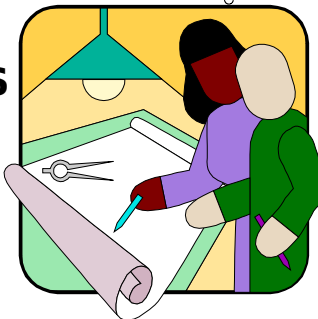
ICD
CONOPS
CDD
CPD

ASP and SSAS/AP

Risk
Assessment
PSMP

Offeror(s) Proposal

IMP/IMS



RFP

SOO
Sec M
Sec L
Sec C/J
CDRL
TRD/SRD

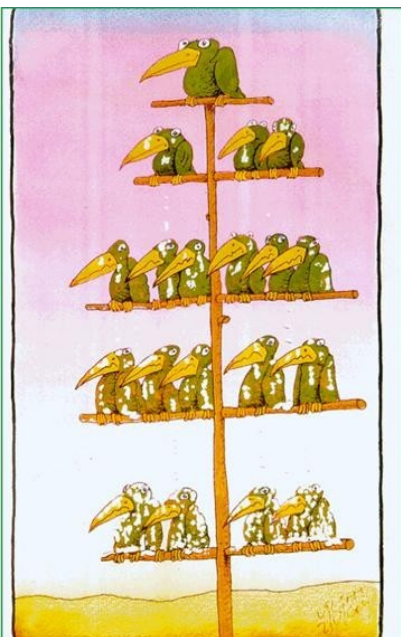


START

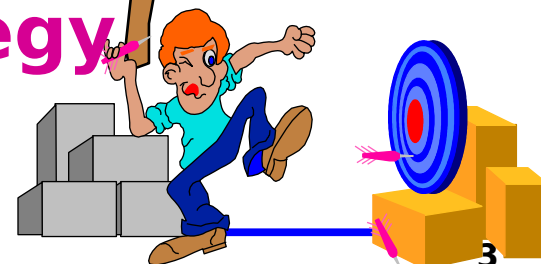
CONTRACTOR

...to bridge the GAP,
Program Managers
must provide input:
TRD/SRD or Specs
Acquisition Strategy
RFP
Source Selection

SOURCE
SELECTION
ILS Advisors
ILS Evaluators

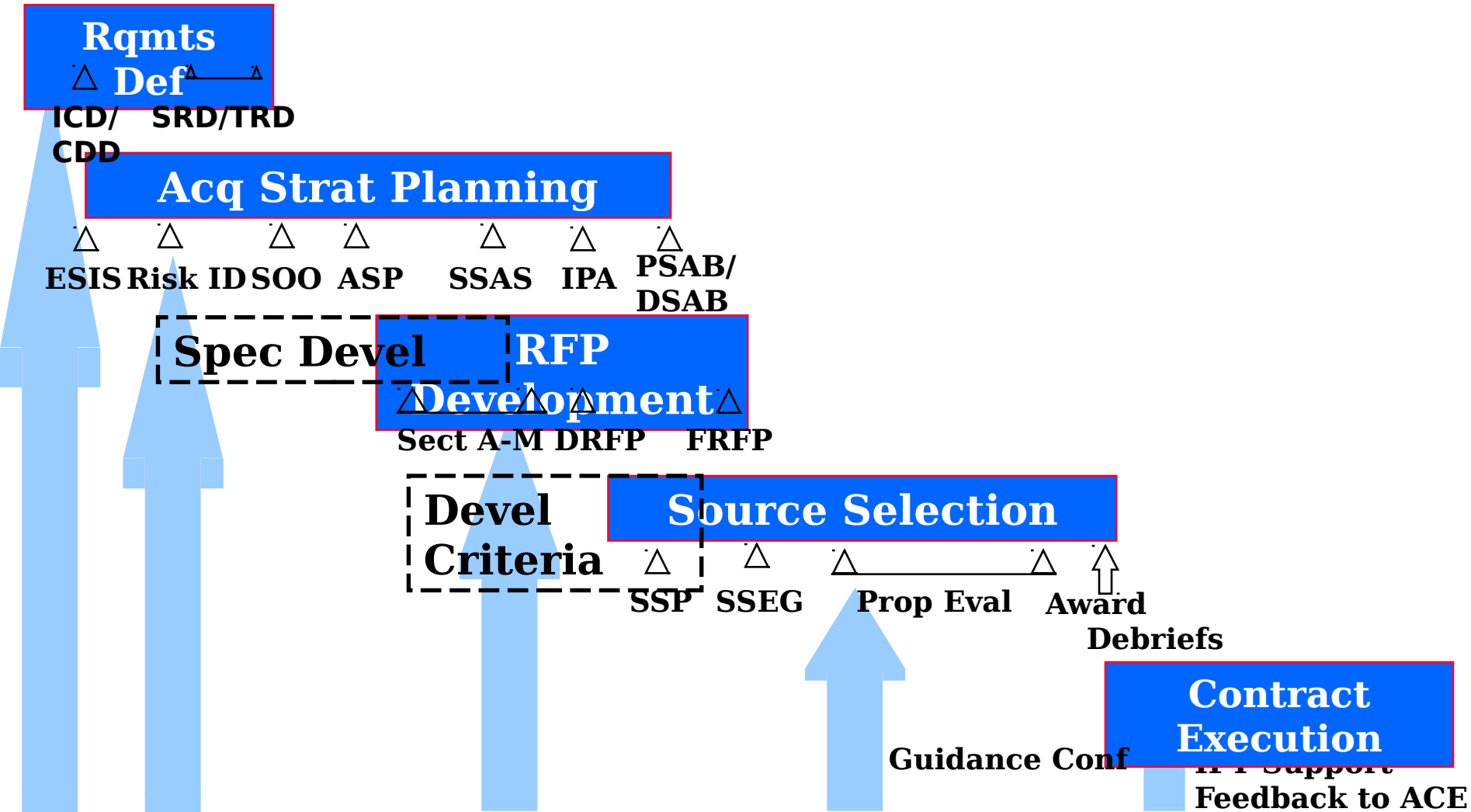


Funding
Budget
ICA
ICE



FINISH

Pre-Award Process (a model)



SMC ACE provides IPT participation, training, coaching & review

DoD Directive 5000.1 -- The Defense Acquisition System

Major Policy Statements - May 12,
2003

From old DoDD
5000.1

- Program Stability
- Cost & Affordability
- Integrated Test & Evaluation
- Total Systems Approach
- Technology Development & Transition
- Interoperability
- Research & Technology Protection
- **Performance-Based Acquisition**
- Competition
- Independent Operational Test Agency
- Streamlined Organizations
- **Professional Workforce**
- Information Superiority
- Information Assurance
- Knowledge-Based Acquisition
- Products, Services &

From old DoDI
5000.2

- Cost Sharing
- Cost Realism
- Reduced Cycle Time
- Collaboration
- Legal Compliance
- International

Agreements

From DoD 5000.2-R

- Intelligence Support
- Systems Engineering
- **Performance-Based Logistics**
- Safety
- Program Information

NEW

**Financial Management
Enterprise Architecture
(FMEA)***

*Now called "Business Enterprise Architecture"

DoD Directive 5000.1 -- The Defense Acquisition System

DoDD 5000.1, chg1, 4 Jan 01

- **Five major categories containing 14 definitive policy statements:**

- Achieving Interoperability
- Rapid & Effective Transition from S&T to Products
- Rapid & Effective Transition from Acquisition to Production
- Integrated & Effective Operational Support
- Effective Management

- **12 pages (with 3 enclosures)**

Most policy statements from old DoDD 5000.1 are summarized and included in the new DoDD 5000.1.

+

Policy was added from old DoDI 5000.2 and DoD 5000.2-R

DoDD 5000.1, May 12, 2003

- **Five major categories and 29 short, clear and concise policy statements:**

- Flexibility
- Responsiveness
- Innovation
- Discipline
- Streamlined & Effective Management

- **8 pages (with 1 enclosure)**

DoD Instruction 5000.2 -- Operation of the Defense Acquisition System

- New 5000.2 (May 12, 2003) now replaces 30 Oct 02 Interim Guidance

- Following deleted from previous 5000.2:

- Reduced from 46 to 36 pages
- Program Initiation in advance of Milestone B (except for Ships)
- Transition Fund in FYDP*
- Approval of Acquisition Strategy prior to

***Discretionary areas are covered in Guidebook (former DoD 5000 release of RFP (now MDA option)**

DODI 5000.2 -- Policies & Guidance

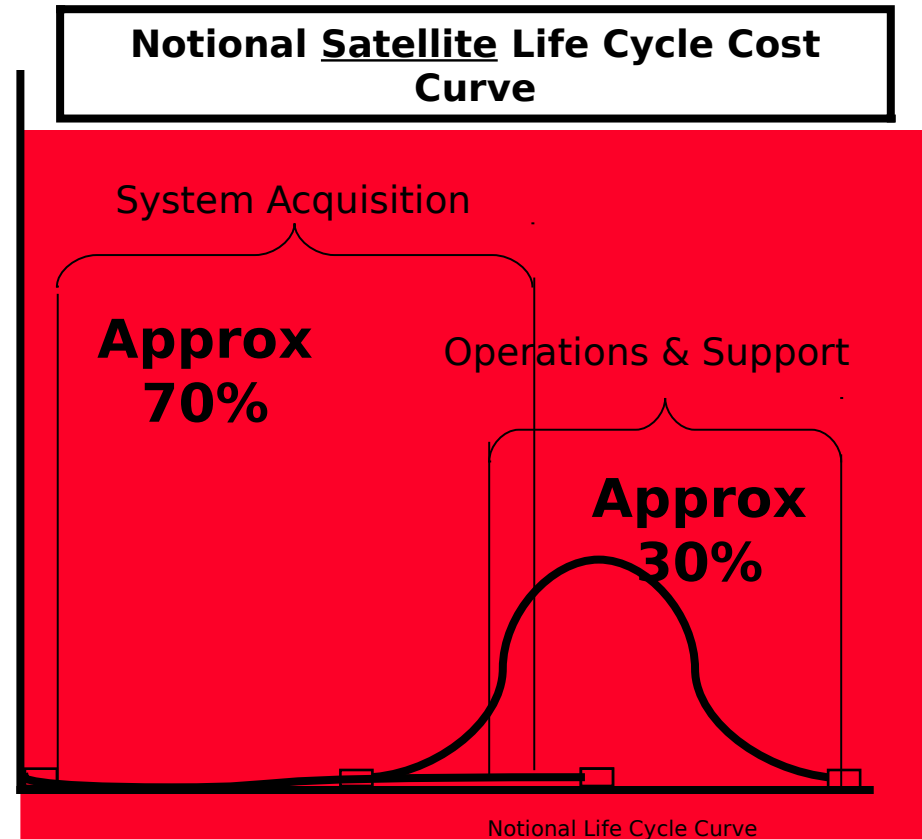
- ***“Designing and Assessing Supportability in DOD Weapon Systems: A guide to Increased Reliability and Reduced Logistics Footprint”*** - 29 May 2003
 - Provides a reference to design in and then assess the effectiveness of their total life cycle systems management responsibilities in implementing performance based logistics strategies anywhere along the system’s life cycle
 - Formerly known as DOD 5000.2-R

National Security Space (NSS) Acquisition Policy 03-01

- NSS 03-01, dated 6 Oct 03, formally signed by the USecAF Space
- Defines an Acquisition Decision Process that works in parallel to standard acquisition process
 - Streamlines the process to get a formal decision
 - Defines Defense Space Acquisition Board (DSAB) process
 - ✓ Independent Program Assessment (IPA) for technical/programmatic evaluation
 - ✓ Independent Cost Analysis (ICA) for cost assessment/estimate by OSD CAIG
 - ✓ Integrated Program Summary (IPS) provides top-level program documentation
 - Does not change how we currently acquire space systems
 - Used in lieu of DoDI 5000.2 (waived for SMC Space Programs)
- 03-01 uncouples Key Decision Point (KDP) decisions from contractual actions to allow for greater program flexibility
- 03-01 process allows for smart tailoring to match individual program needs and constraints

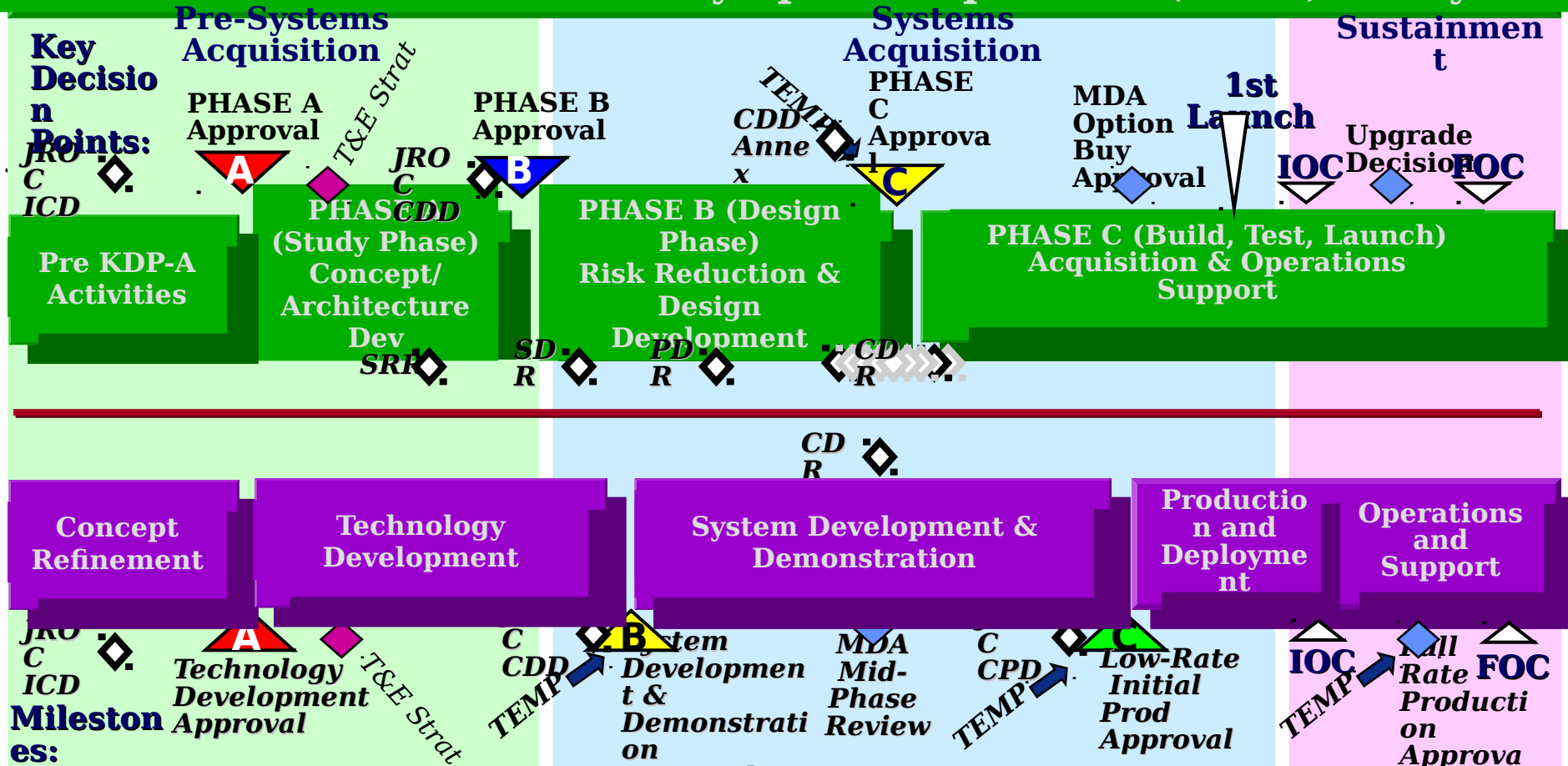
Tailored Process for Space: Satellite LCC

- Activities in each curve
 - Systems Acquisition:
 - ✓ 3020
 - ✓ 3080
 - ✓ 3010
 - ✓ 3600
 - ✓ Launch
 - O & S:
 - ✓ 3400
 - ✓ 3500
- Space-related programs -- especially satellites -- are different for typical DoD production systems
 - Biggest costs occur developing satellite and getting to orbit



Tailored Process for Space: Acquisition Phase Comparison

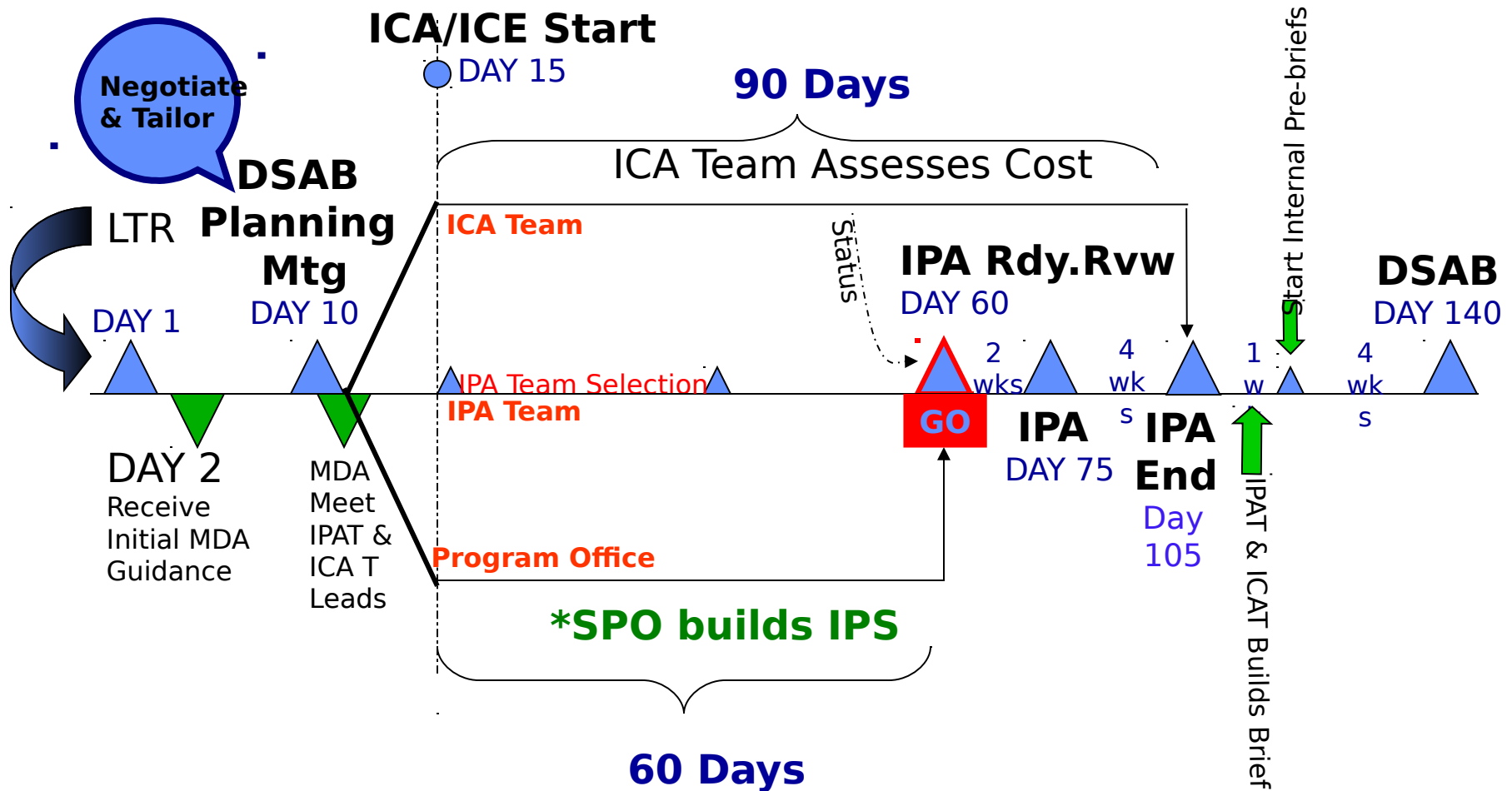
DoDD 5000.1 & National Security Space Acquisition (NSSA) Policy 03-1



Integrated Program Summary (IPS) Enclosure 5 of DSAB Package

- Used to facilitate IPS Team Review
- Concise documented record of NSS program accomplishments
- Not Coordinated
- Minimal set of pre-approved material (e.g., ICD/CDD/CPD, Acq Strategy, ASP, SSAS, TEMP)
- Newly generated IPS subject topics (NSSA Pol 03-01, AP4.2)
- Program office prepares for IPS Lead (prior IPA Start)

Integrated Program Assessment (IPA) Process



***=IPT Input Required**

Space Systems Acquisition Strategy (SSAS)

(NSSA Policy 03-01, Appendix 4)

- Documents/Describes Acq Approach to Acquire a System
- 20 Slides plus 10-20 Pages (to amplify details)
- Replacement for Acq Plan or SAMP
- Complies with FAR 7.105 (“Written Acq Plan”)
- Prepared before KDPs and updated accordingly
- Developed before ASP; Update after ASP
- Reviewed General Counsel or Judge Advocate General
- PEO Endorses; SPD/PM submits to DOD Space MDA for guidance and approval
- RFP can be released once SSAS is approved

SSAS Topical Areas

- Program Description
- Program Office Description and Activities
- Risk Areas and Design Considerations
- Acquisition Approach and Program Structure
- Business and Contracting Strategy
- Identify Potential Sources

Evolutionary Acquisition (EA)

Another DODD 5000.1 Policy

***Evolutionary Acquisition (EA)** is a nontraditional, overarching acquisition strategy that a program can use to develop and field a core capability meeting a valid requirement with the intent to develop and field additional capabilities in successive **Increments**.

***The Spiral Development process** is an iterative set of sub-processes that may include: establish performance objectives; design; code, fabricate, and integrate; experiment; test; assess operational utility; make tradeoffs; and deliver.

Overview Part 2

- **Acquisition Center of Excellence (ACE)**
- **Purpose of Session (Outcomes)**
 - **RFP/Source Selection Process**
- **Purpose of RFP Training**
- **The RFP Development Process Model (Overview)**
- **Notional Program Example (Using an Aircraft Purchase)**
- **Let's Build the Section M (An Approach)**
- **Source Selection Overview**

Acquisition Center of Excellence (ACE) (SMC/AXD)

- Support Center command section (SMC/CC)
- Direct functional relationship to PEO and USECAF Space
- Close association with HQ AFMC/AE (Central ACE)
- Staffed with qualified experts – IPT member/coaches
 - Multifunctional staffing relationships established with AX, BC, EN, IN, LG, FM, PK, and Det. 12
- SMC agile acquisition (use EA) focal point/change agent
 - Discovery Map training
- Make Agile Acquisition succeed
 - Drive behavior by measuring performance
 - Innovate today's programs to meet future AFSPC needs
- Real time acquisition program support and training

SMC ACE People

- Multi-Disciplined, Experienced, & Current on Acq. Policy
 - Lots of lesson learned gathered
- Assigned People to SMC/AXD
 - Senior Government, Aerospace, and Support Contractor(s)
 - Program Mgt, Contracting, Senior System Engineers,
 - Logistics, Financial, Pgm Control, Pricing, etc.
- Links to Other Sources
 - Other SMC Staff, Other Centers, Higher HQ

SMC ACE Training

General and Standardized Training

- Address Specific Needs (Customer Specific)
- Tailored to Need and Just-In-Time

AXD Web Site:

<http://ax.losangeles.af.mil/axd/>

SMC ACE Workshops

Statement of Objective and Risk
ID/Assessment

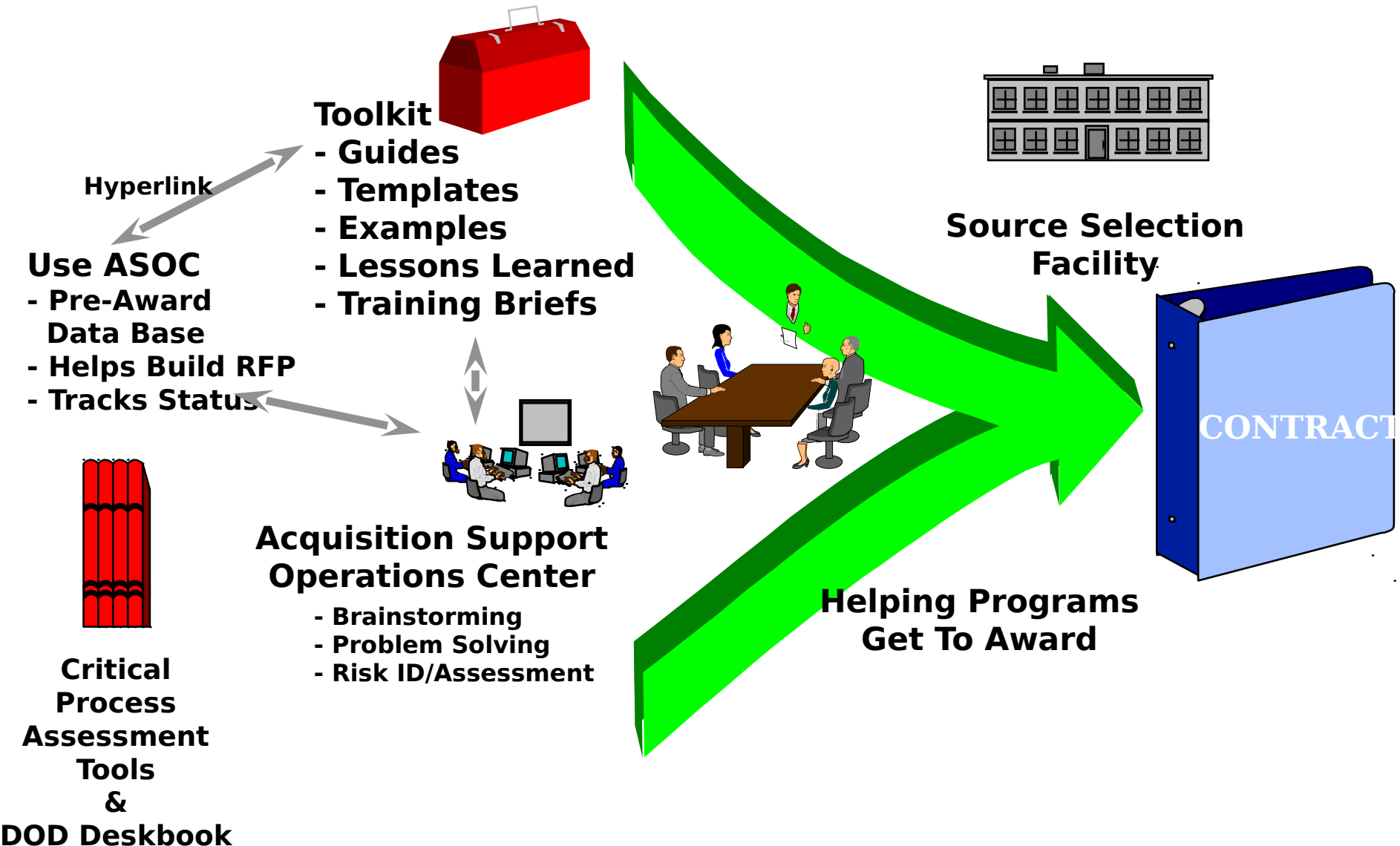
RFP and Source Selection

IPT Team Building [Commercial Source(s)]

DSAB/PSAB IPA Process

Other Specific Topics/Purposes, as Required

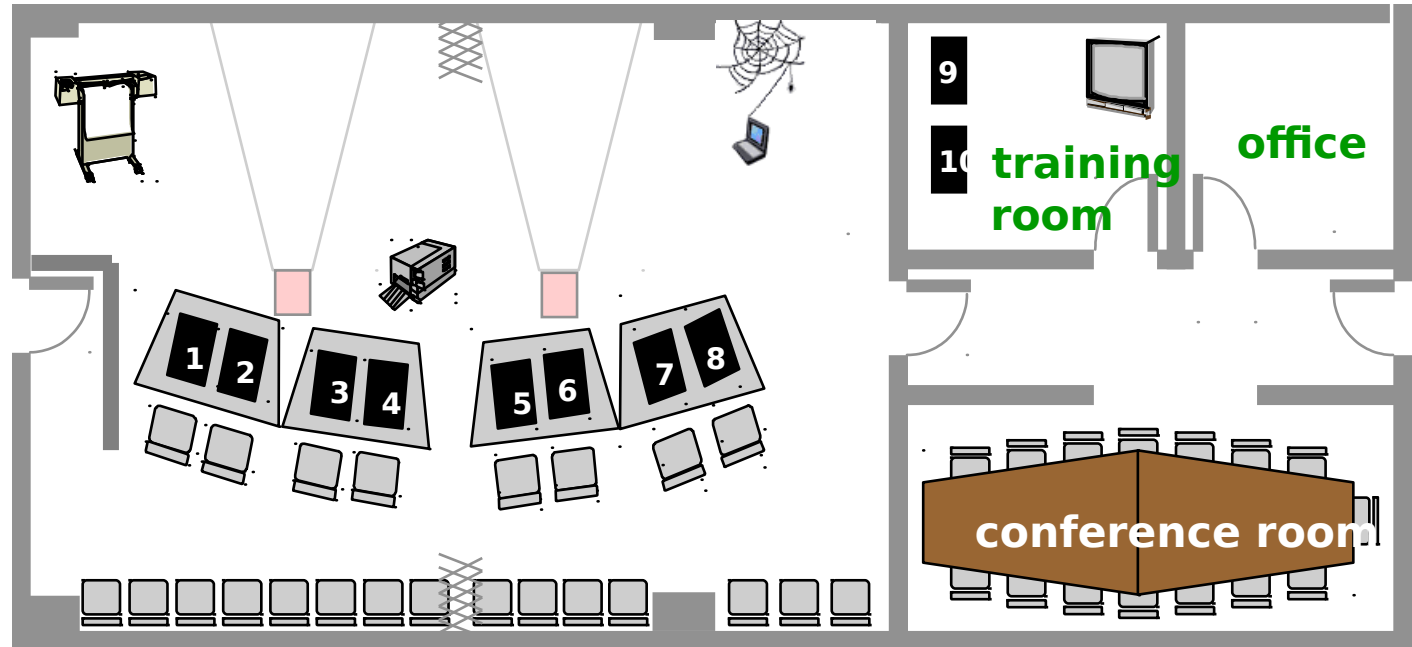
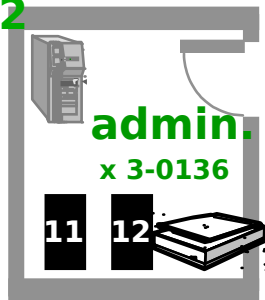
SMC ACE Pre-Award Toolkit



Acquisition Support Operations Center (ASOC)

BUILDING 120, ROOM 113

**BUILDING
120, ROOM
112**



Some of the Noteworthy Features:

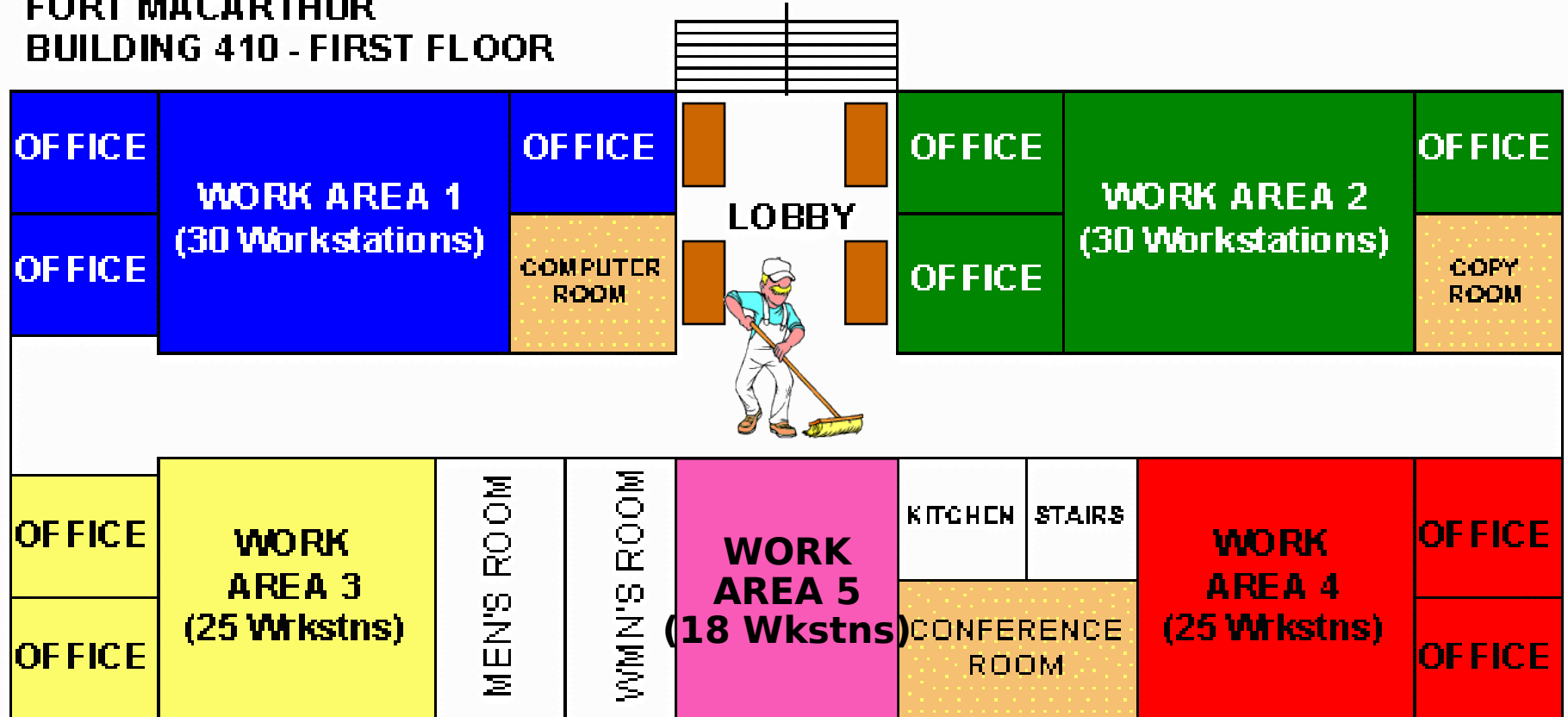
- Ventana Group Systems S/W for Brainstorming and Conse
- Specialized Software for Requirements Devel/Val, Sys Eng
- Access to the Latest Acquisition Development Tools

Learn more about the ASOC at <http://losangeles.af.mil/axd/ipdc.ht>

Source Selection Facility (SSF)

- Five Separated, Secure Work Areas
- Electronic Source Selection Tool (ESS)

FORT MACARTHUR
BUILDING 410 - FIRST FLOOR



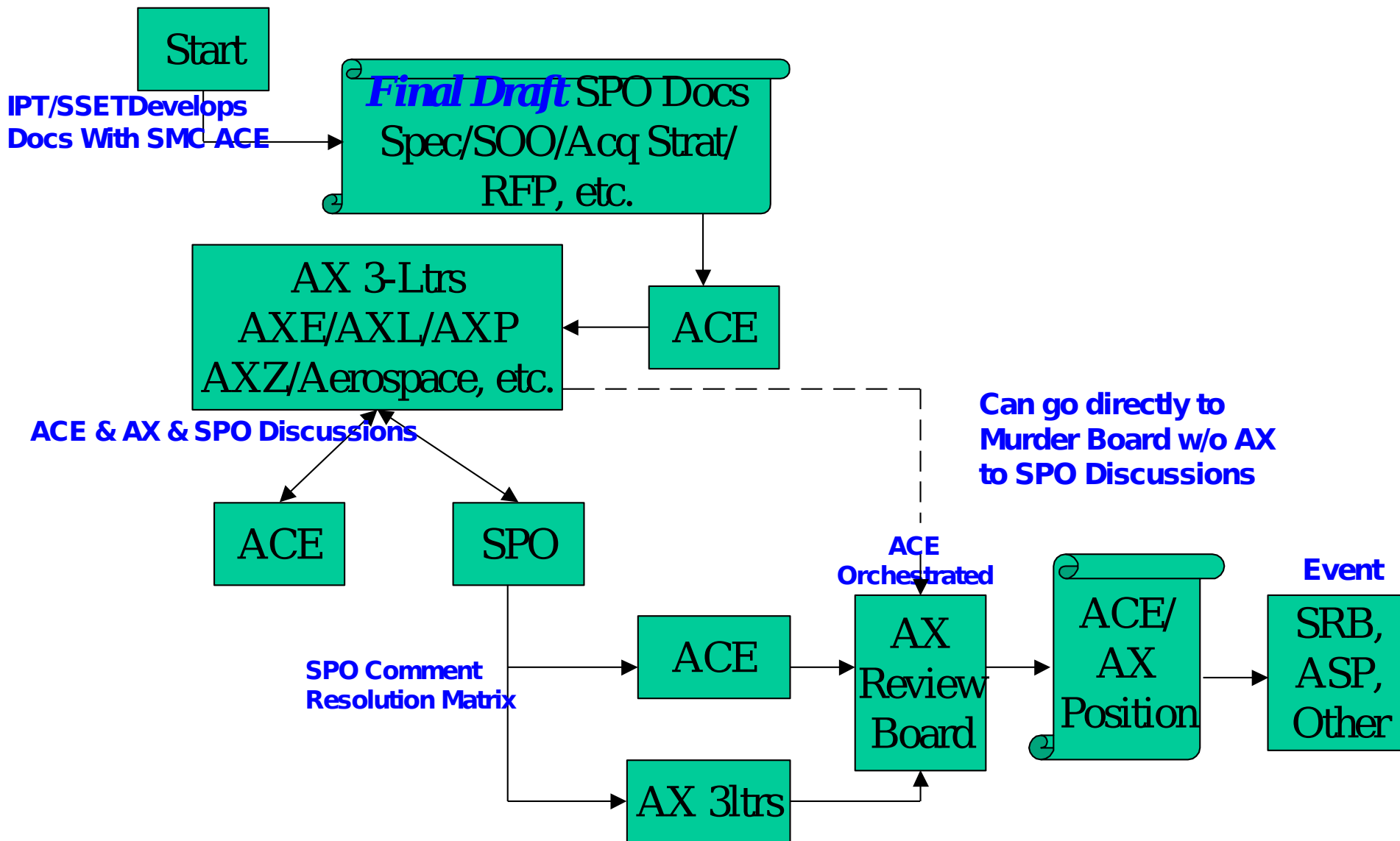
SECURED AREAS

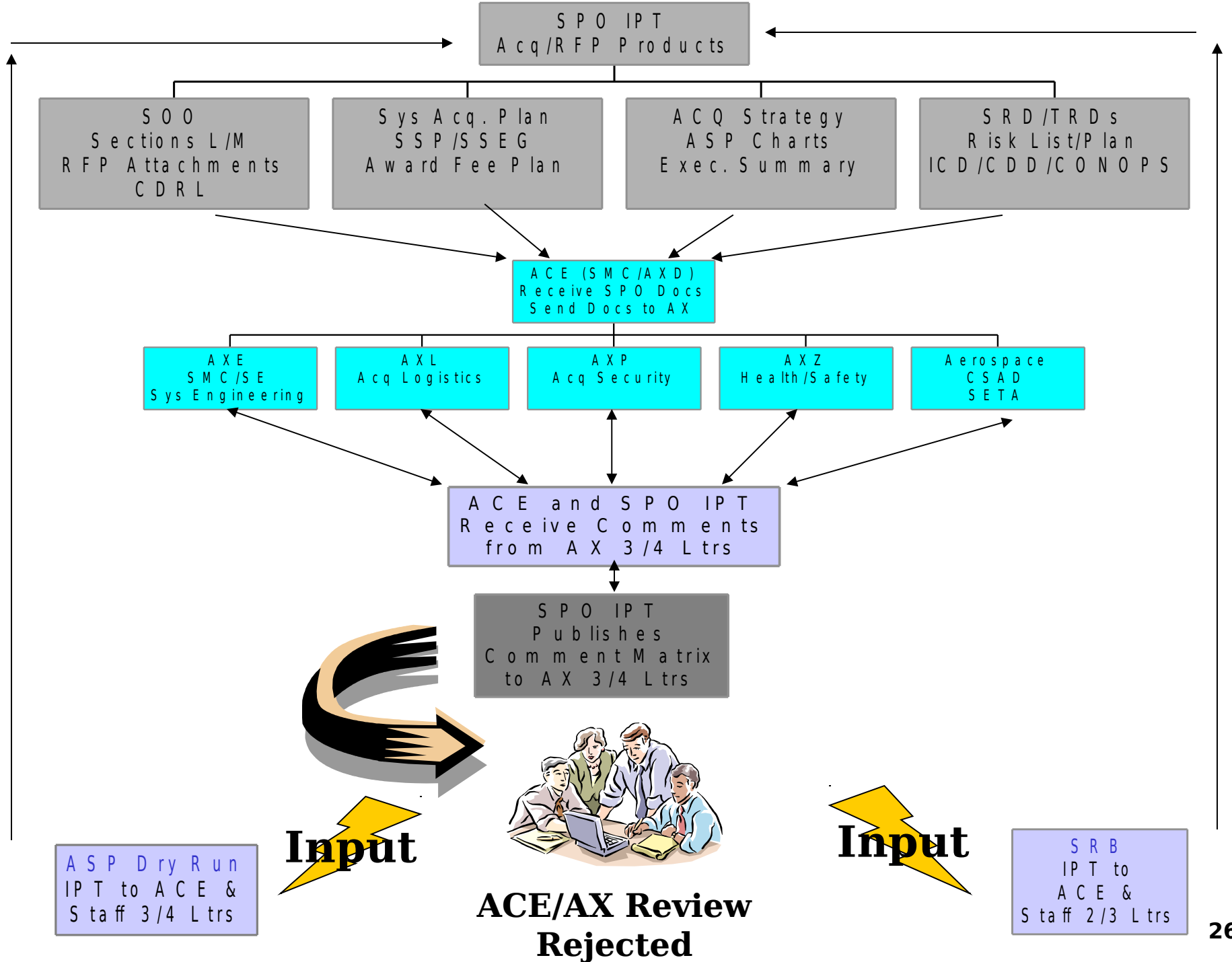
• Basement renovation planned





AX Comment Resolution Process (ACE Topics)

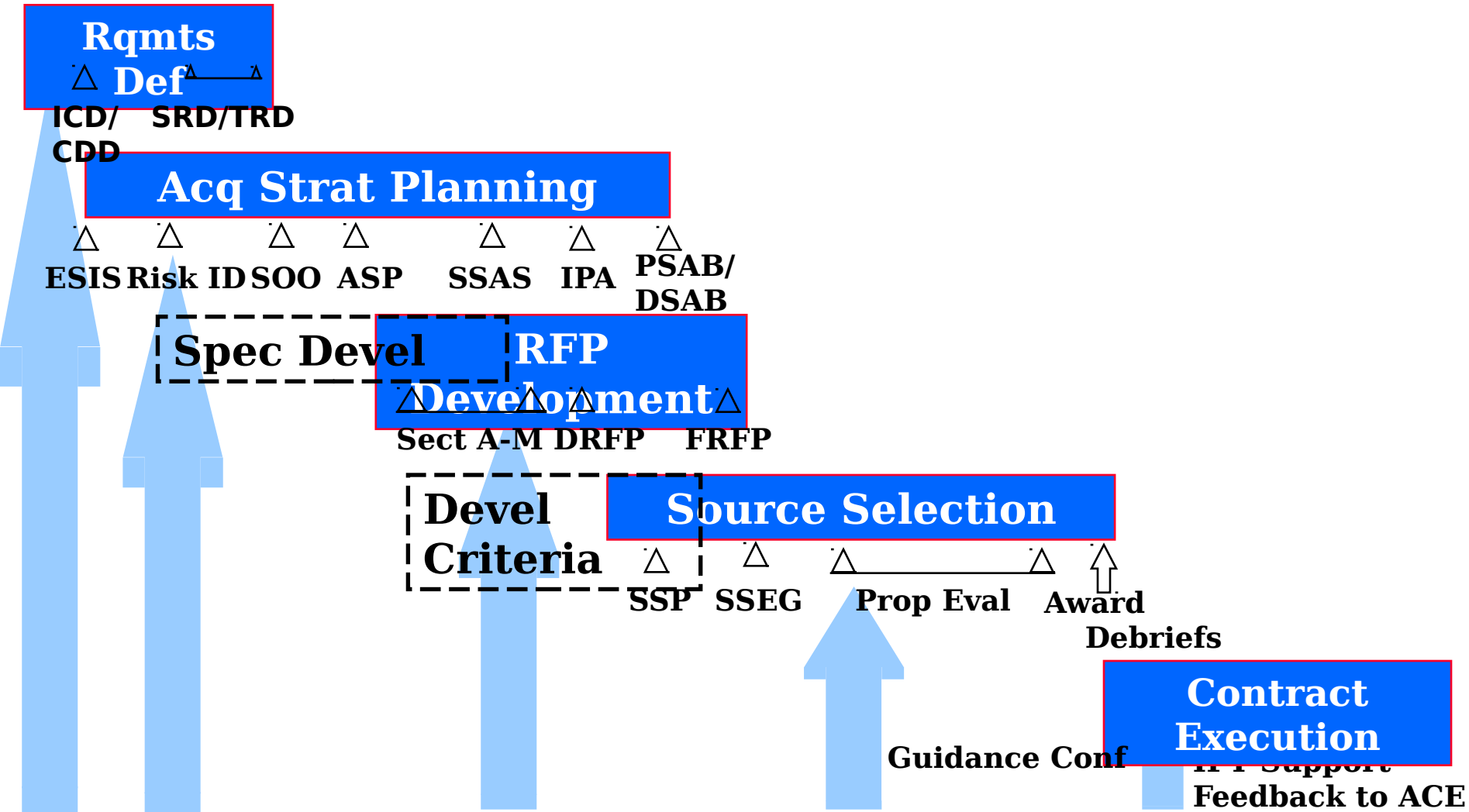




Purpose of RFP Development Training

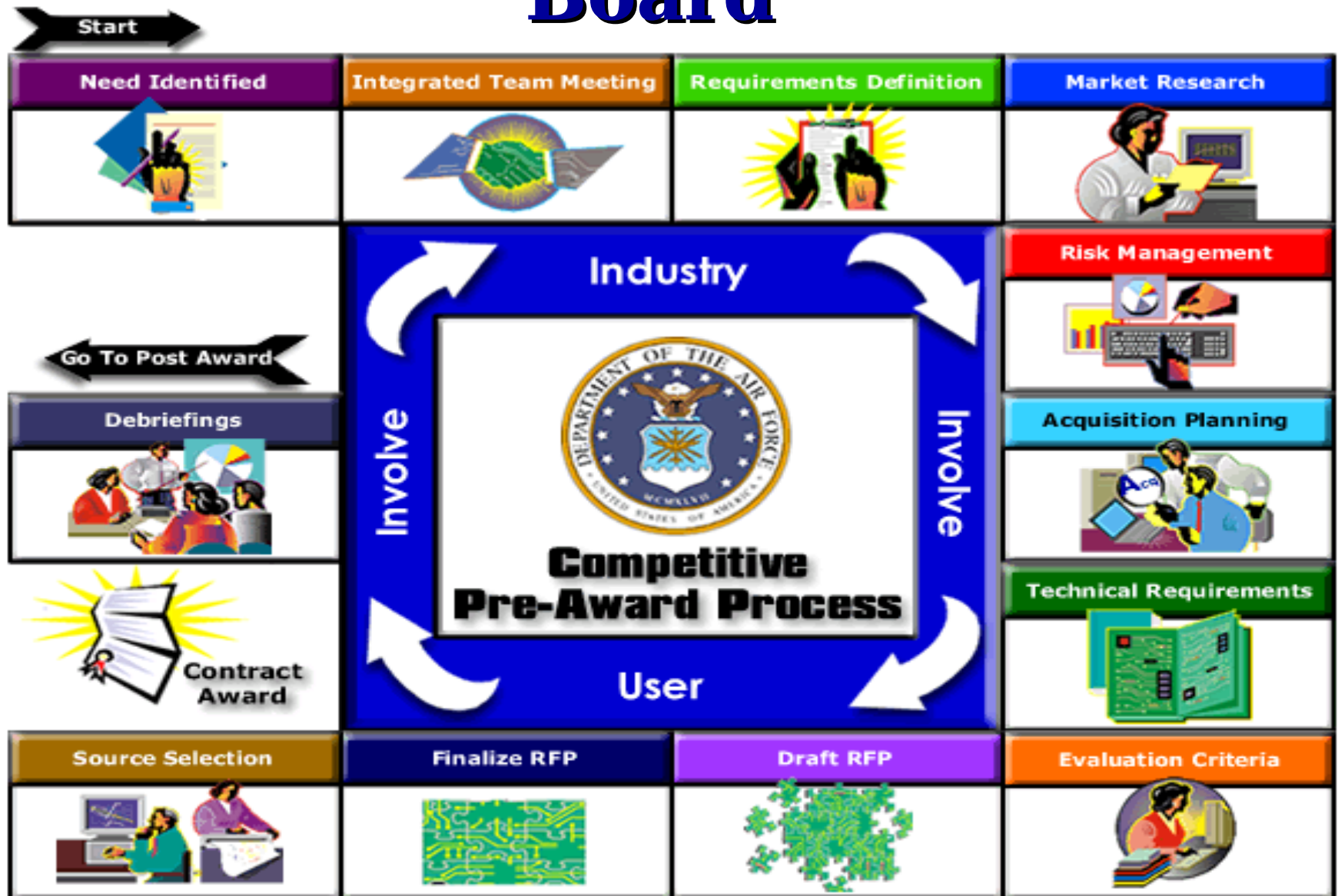
- Show Acquisition and RFP Big Picture Charts
- Understanding of a Systematic Process:
 - To Identify, Analyze, and Assess Only What Is Truly Important for Source Selection
- Demonstrated Traceability of ICD/CDD/CONOPS to RFP:
 - Requirements + Risk Assessment, SOO, WBS, Performance-based SOW, Section M and Section L
 - Selecting Appropriate Mission Capability Subfactors
 - Identification of “Key Discriminators” for source selection Evaluation Criteria

Pre-Award Process (a model)

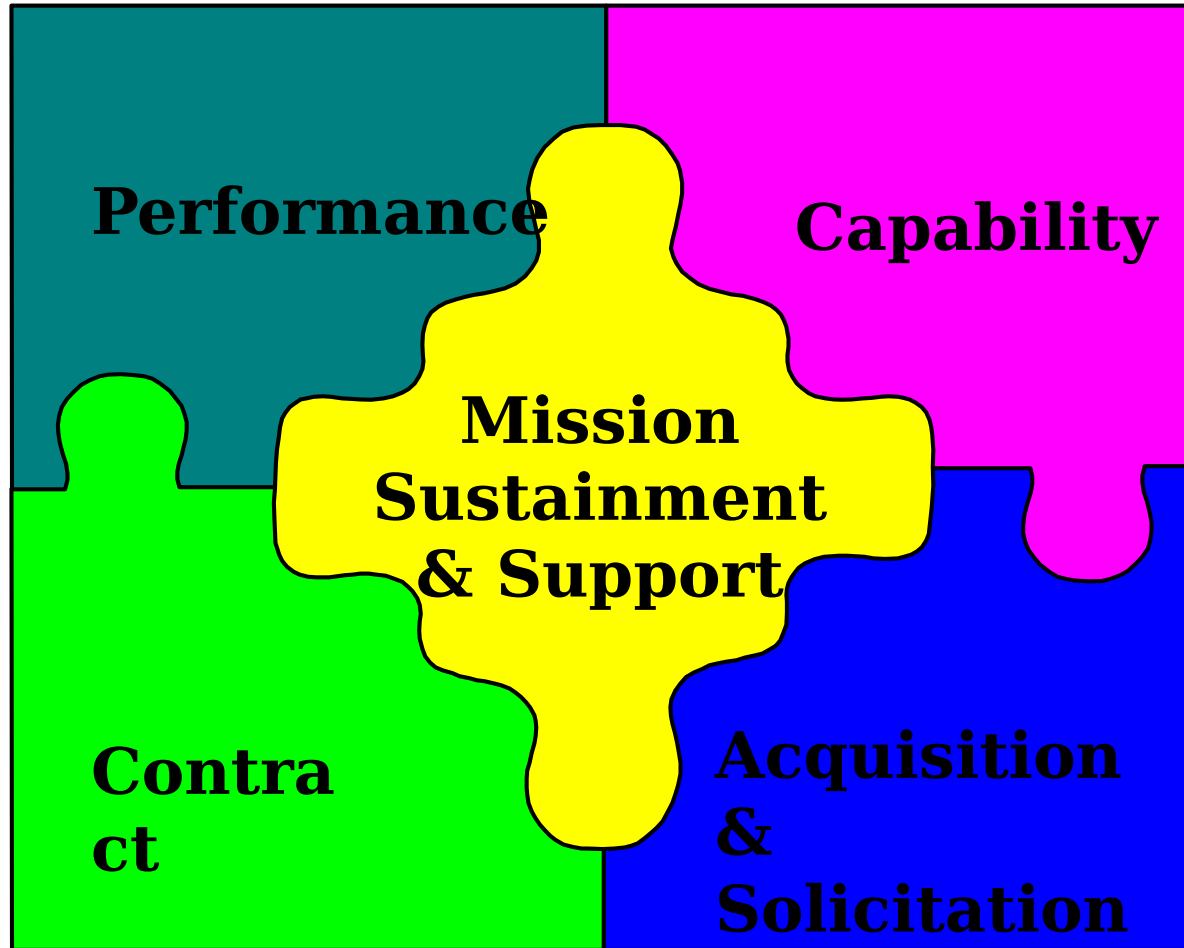


SMC ACE provides IPT participation, training, coaching & review

AFMC Acquisition “Game Board”



The Requirements Set



**Performance and Capability Requirements
are Associated with Best Value Decisions**

Conveying Requirements to the Offerors

Requirements



RFP

ICD/CONOPS

CDD/CPD

ADM

APB/PMD

**Acq Plan or
SSAS**

Statement of Obj

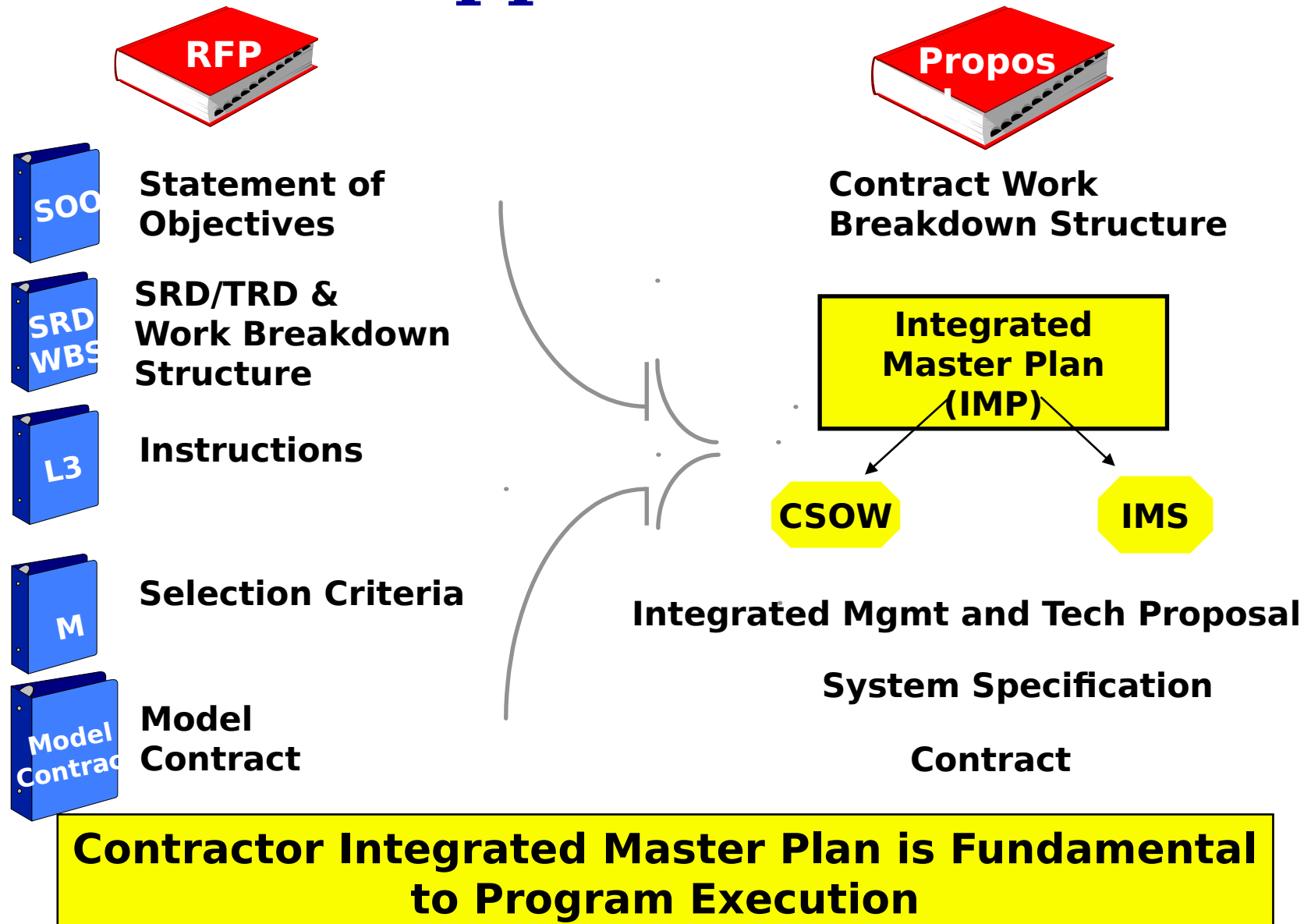
Performance SOW

**Systems /Technical
Reqmts Doc**

Inst to Offerors, Sec L

Eval Criteria, Sec M

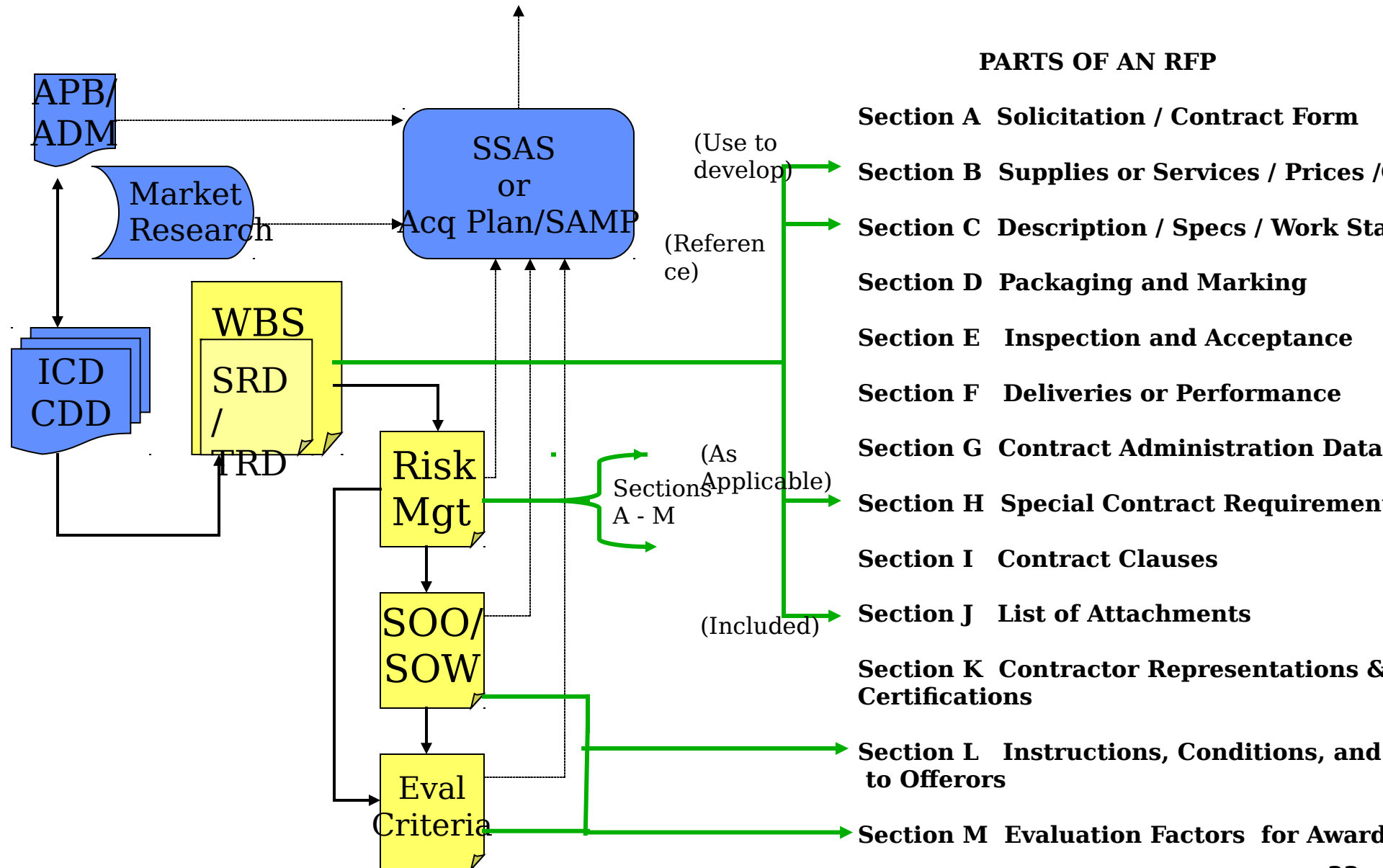
IMP is Key to RFP Approach



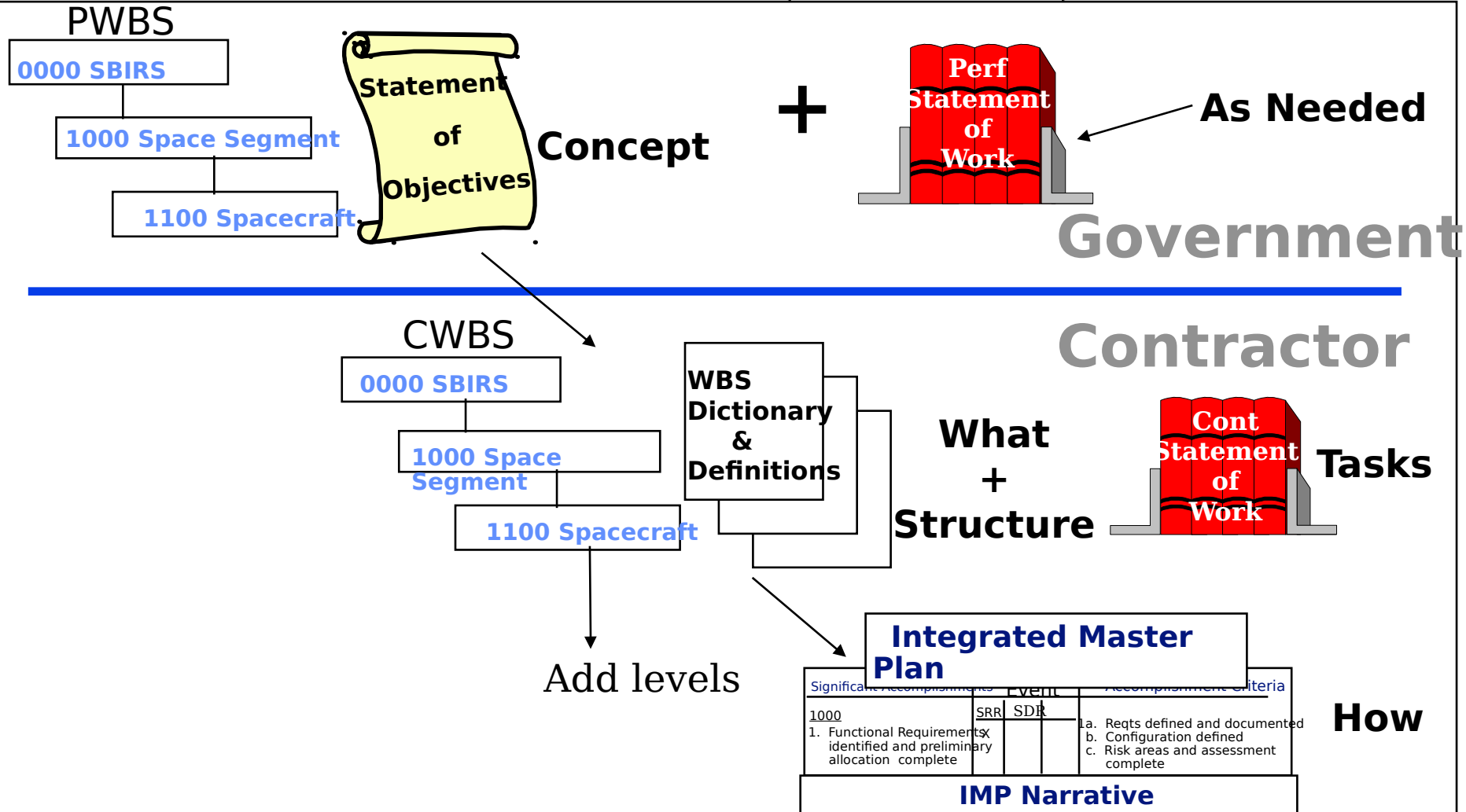
"Tying It All Together"

Acquisition Strategy Panel (ASP)

PARTS OF AN RFP

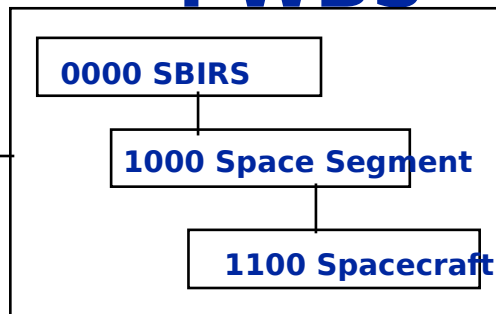


Contract Work Breakdown Structure (CWBS)



Statement of Objectives/ Integrated Master Plan

PWBS



SOO

- Defines Government's high-level objectives
- Used to develop CWBS, IMP, and Performance-based SOW
- Not always part of contract

Integrated Master Plan

Significant Accomplishments	Events			Accomplishment Criteria
<u>1000</u> 1. Functional Requirements identified and preliminary allocation complete	SRR	SDR		1a. Reqs defined and documented b. Configuration defined c. Risk areas and assessment complete

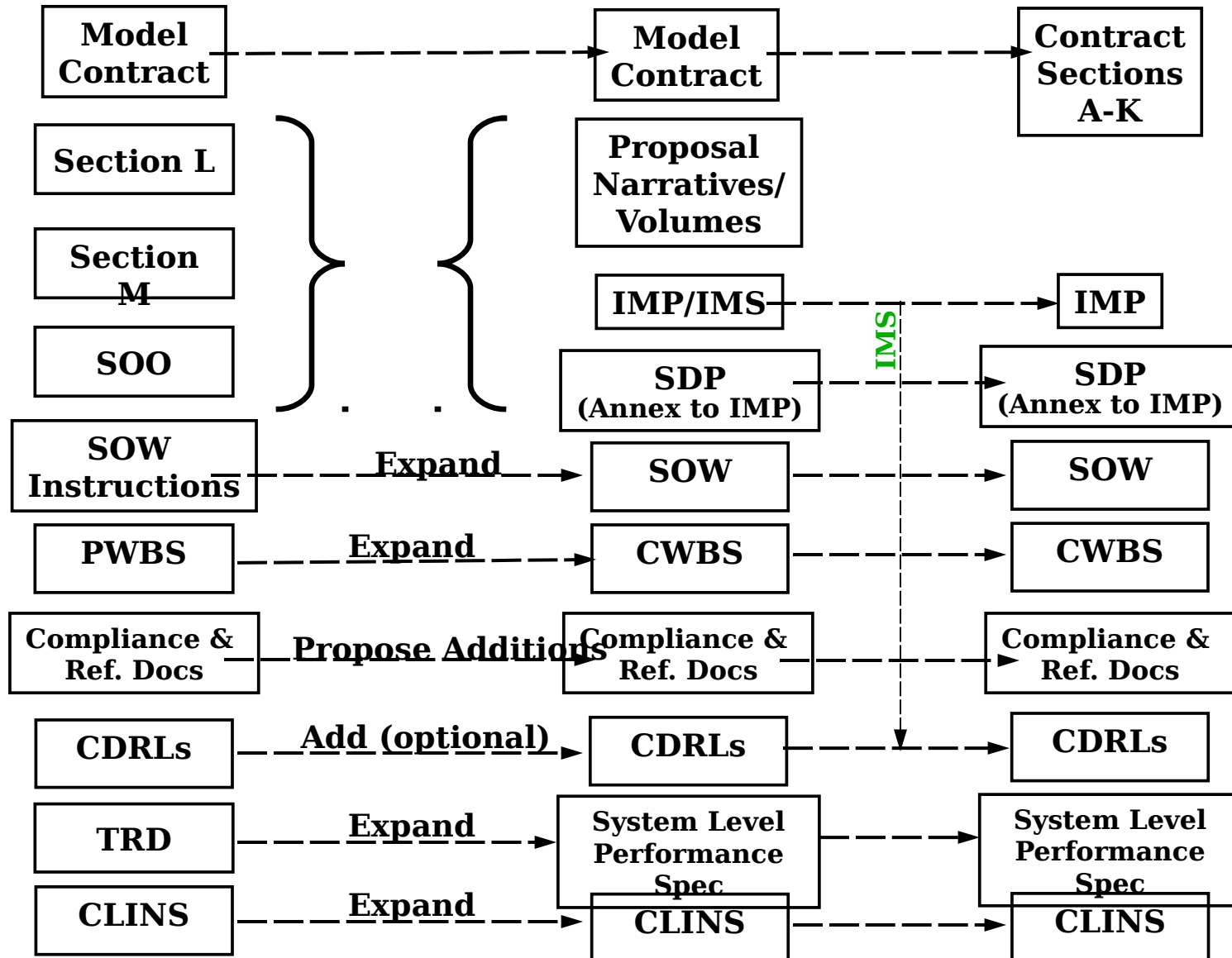
IMP Narrative Defines How Ktr will Accomplish Tasks

Can replace the CSOW

Document Linkage

Provided in RFP

Provided in Proposal On Contract at Award



Contract Content Responsibilities

Government

SRD/TRD

Smaller CDRL

Some Specs/Std

FAR Clauses

WBS (Top Tier)

Perf Based SOW

Contractor

Performance Based Contracting

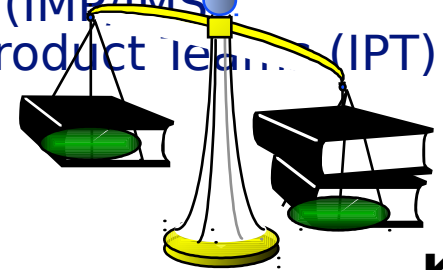
Contractor Reports

**International Standards
Commercial/Best Practices**

Integrated Product Development

- Integrated Master Plan and Schedule (IMP/IMS)
- Integrated Product Team (IPT)

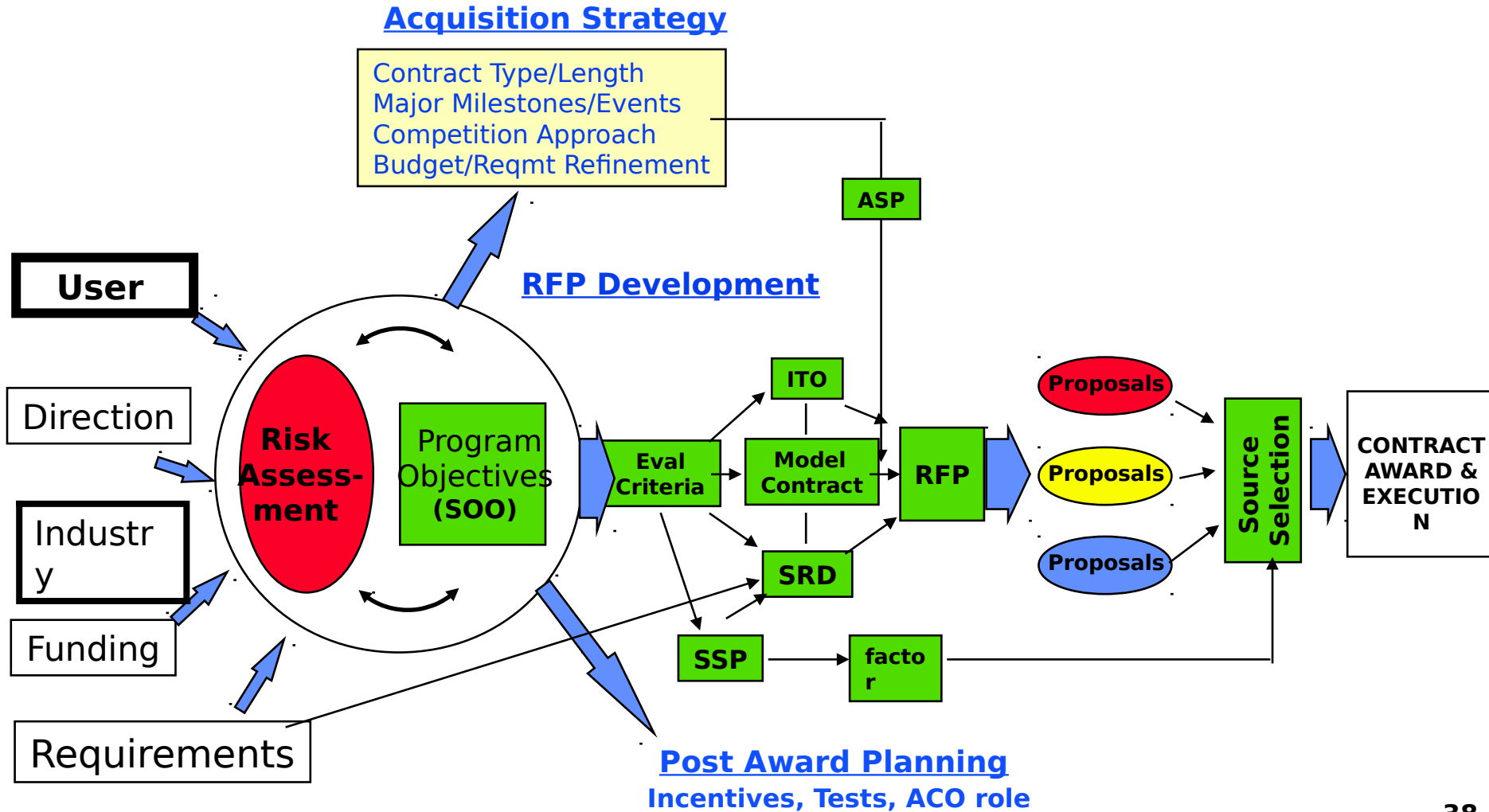
GOV



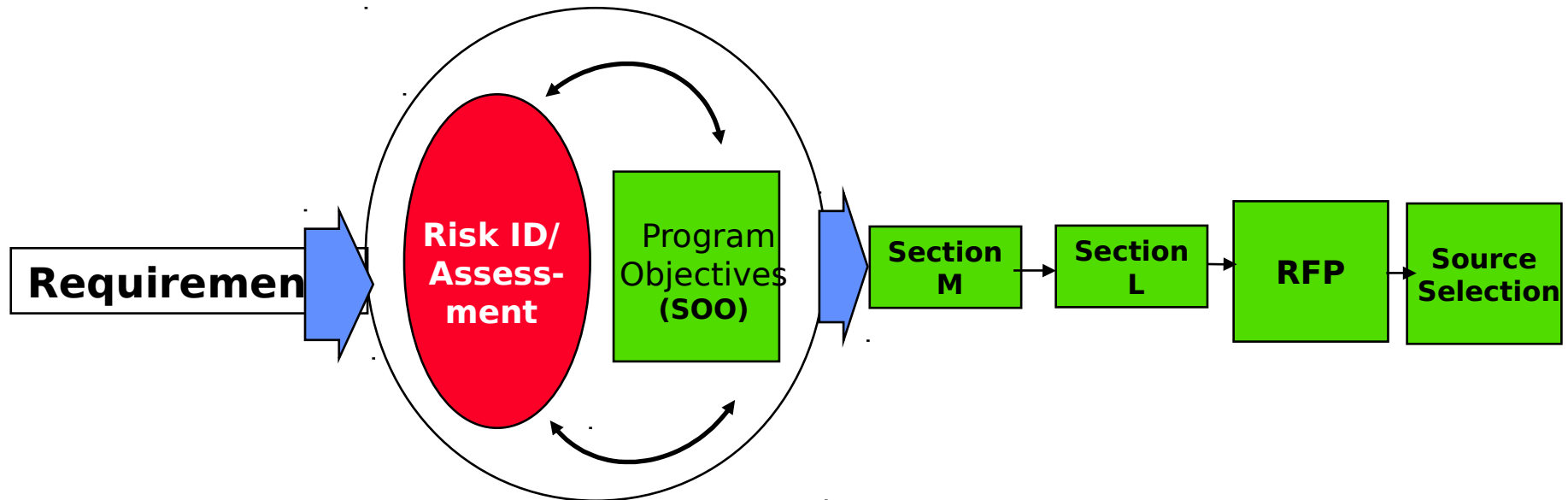
KTR

Contractor has More Role in Defining the Program Structure

RFP/Source Selection Process Model



RFP to Source Selection Process Model Focus



What is Risk?

- RISK IS THE PROBABILITY OF AN UNWANTED EVENT OCCURRING IN COMBINATION WITH THE SIGNIFICANCE OF THE CONSEQUENCE OF THAT OCCURRENCE



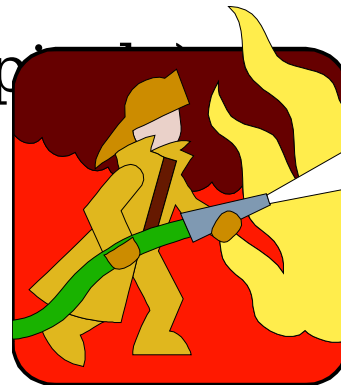
- Why Manage Risk?

Well established as best practice*

** = Risk assessment was originally mandated for all DoDD 5000.1 - it is now fully integrated in all DODD process and procedures guidance documents*

Mitigating Risk

- Given an unwanted occurrence, how do we deal with it?
 - Avoid (remove)
 - Control (manage)
 - Assume (monitor)
 - Transfer (to other phases/increments/segments/sp...
 - Use Knowledge & Research
 - ✓ Offer other solutions sets to meet requirements

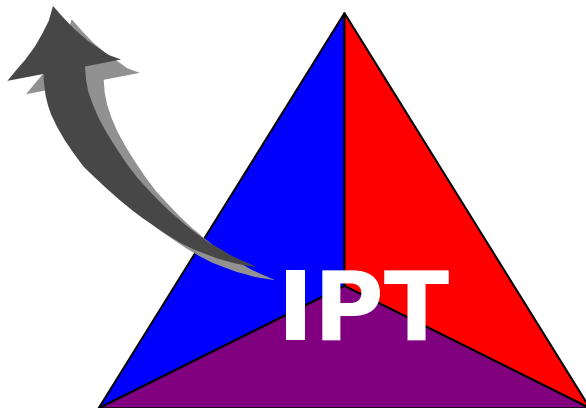
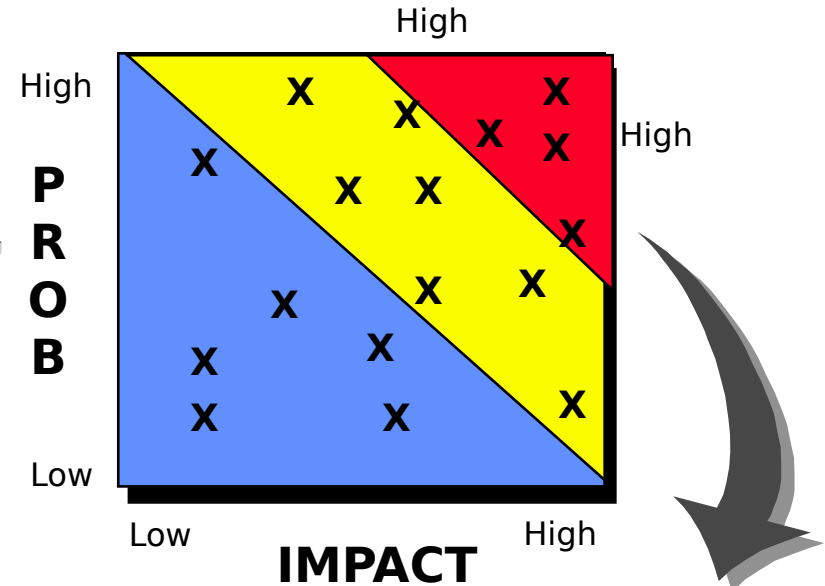


Risk Management Acquisition Strategy Focus

RQMT	RISK	IMPACT	PROB	RATING
Technical Risks				

Programmatic Risks				

Business Risks				



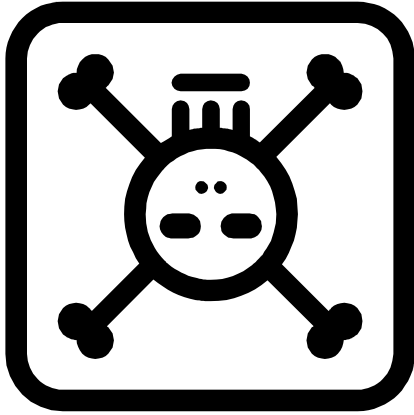
Acquisition Strategy (PSMP/AP/SSAS)

- RFP Content (SOO) and/or Perf. SOW
- Evaluation Criteria (Section M)
- Proposal Preparation (Section

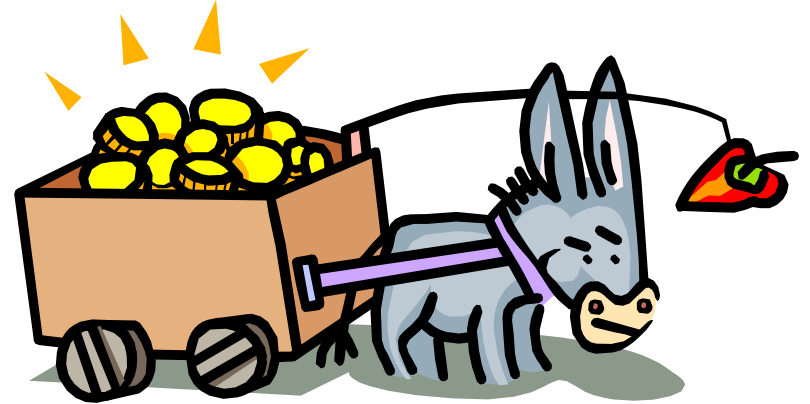
Statement of Objectives (SOO)

- Both a product and a process
 - Process forces use of risk assessment and IPTs
- Included by Government in RFP (sec J)
 - Referenced in proposal prep (Section L) and evaluation criteria (Section M)
- Function of program risks, key performance parameters (KPP) and also high-value requirements
- Identifies top-level program & contract objectives
 - Specifically addresses higher risk items
- Focusing device for solicitation
 - Basis for evaluation factors for award
- Not (generally) incorporated in contract

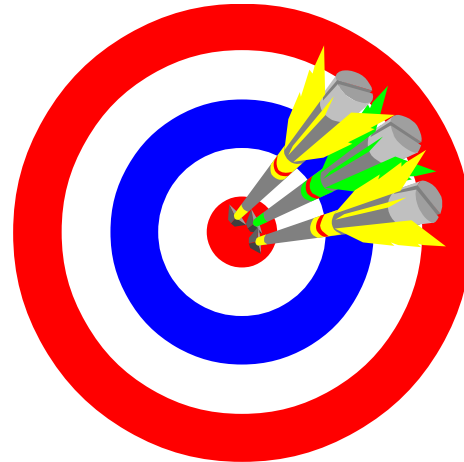
SOO Input



**High-Medium
Probability
High-Medium
Impact
RISKS**



**High Value
Requirements
& KPPs**



**SO
O**

Documents Flow to S00

**User
ICD,
CDD**

**Specs &
SRD/TRD**

Acquisition
Rqmts

Risk ID &
Assess

Market Research
Milestone/Phase
Acquisition
Strategy
PMD/ADM/APB
Tasking
High -Value
Initiatives

S00

Processing the “Objectives”

- Stay focused on source selection discriminators and keep the fodder out
- Use “Top down “ approach to filter fodder
- Get buy in from IPT (and then Industry) using slides, before writing any RFP text
- Use slides to keep IPT focused (refer back to slides during reviews of drafts)
- Don’t let IPT go off and write until the time is right

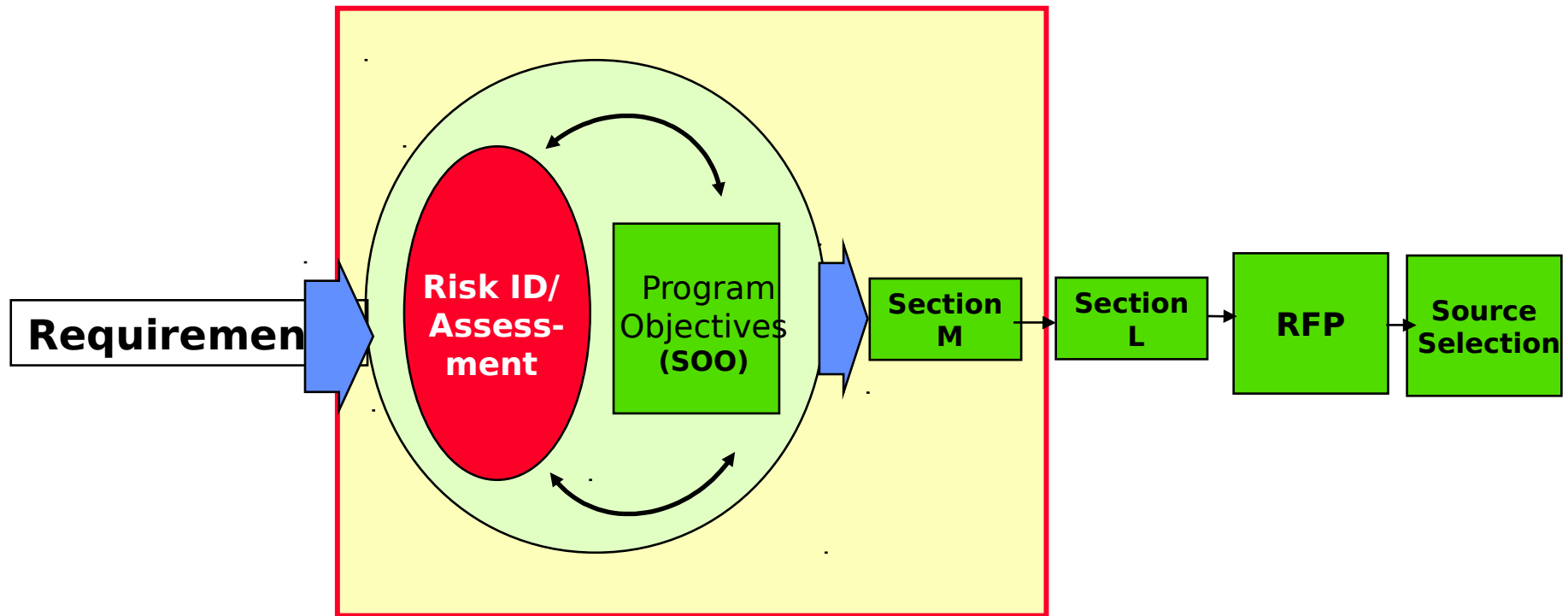
Process Example

Situation:



- **Emergency Situations Frequently Require Members Of Congress And Other DoD Agencies To Travel In CONUS**
- **Standing Fleet Of Six (6) Aircraft Will Be Maintained at Andrews AFB, Maryland**
- **Training Program Required**

Risk to SOO to Section M Focus (revisited)



Technical Requirements

Performance Based Requirements

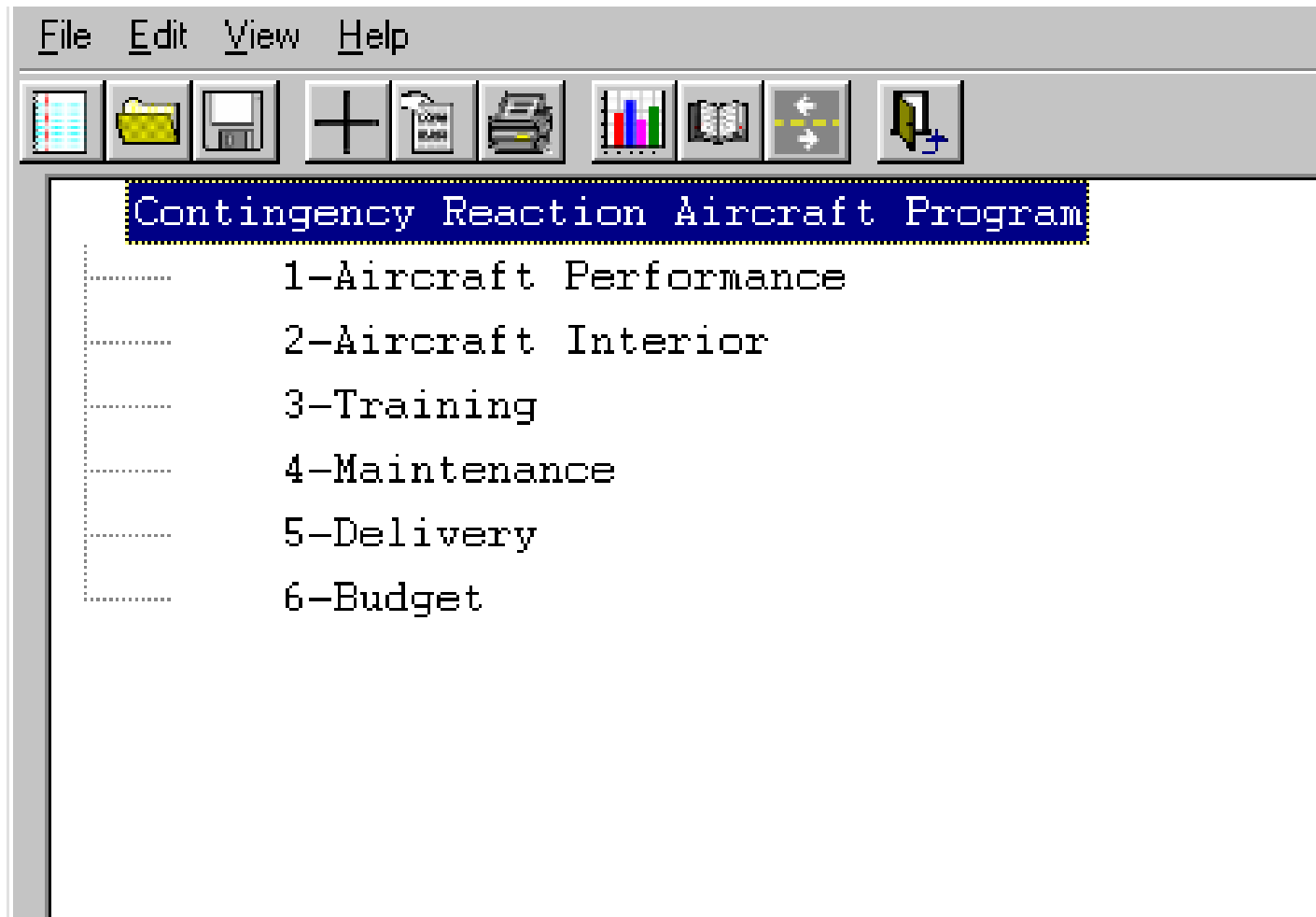
- Ability to cruise at 35,000 ft
- Must have a range of 2000 nautical miles with eight (8) passengers
- All aircraft must be the same configuration
- Must be capable of operating in all weather conditions
- Must be maintained at a mission capable rate of 98%



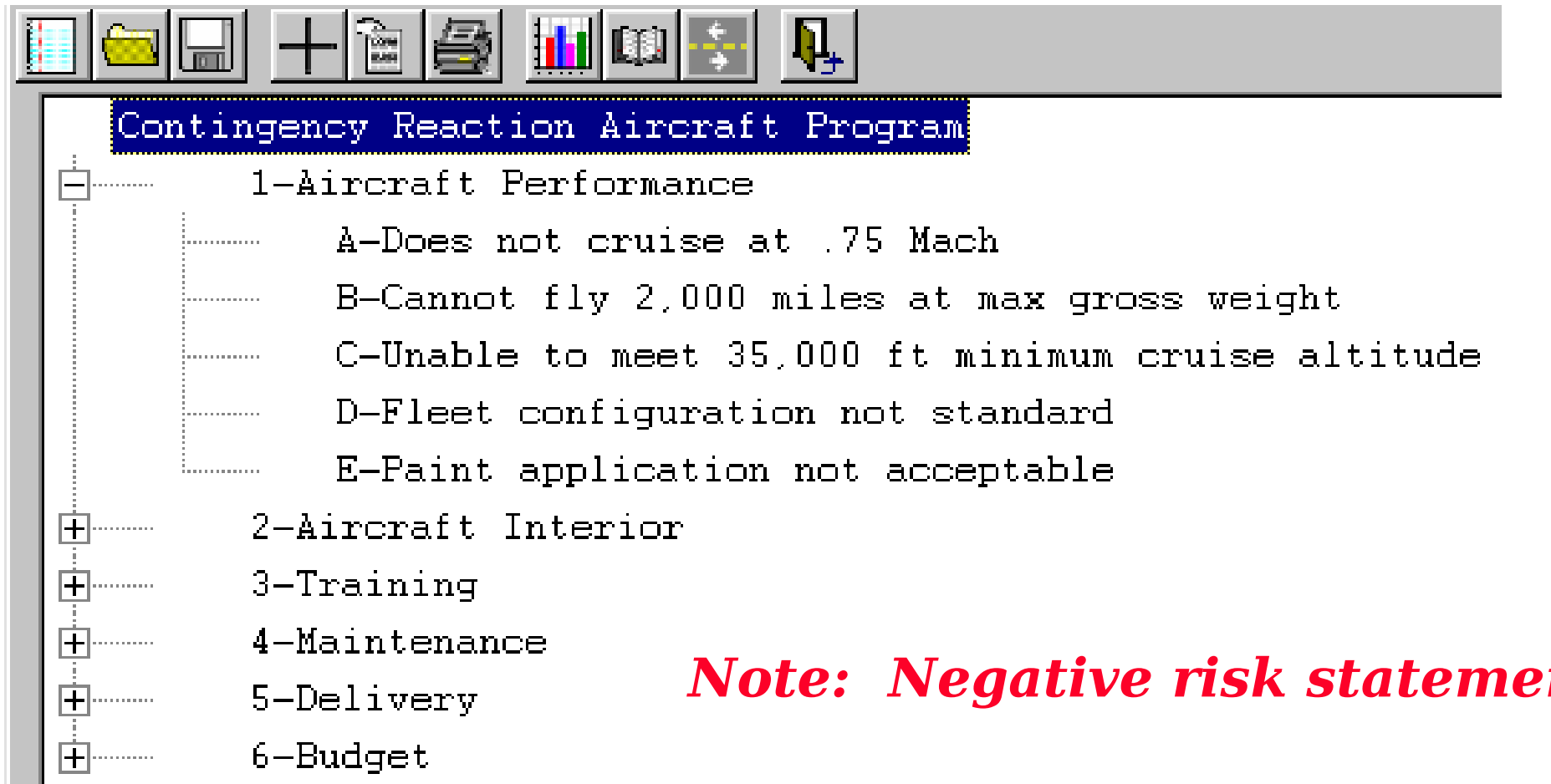
Risk Identification and Assessment

- Determine Requirements and Group Them
- Identify Risks in Meeting Each Requirement
 - State in **Negative** Terms
- Define Probability and Consequence Scales
 - Probability Distribution and Impact Definitions
- Assign Probability and Consequence Ratings to Each Risk
- Plot on Scatter Diagram
- Establish Scatter Diagram Zones
 - **Mitigate**, **Manage**, and **Monitor**
- Integrate the Results
 - Acquisition Strategy, SSAS or AP, SOO, TRD/SRD, RFP Sections L and M

Technical and Program Requirements Groups



Aircraft Performance Risks



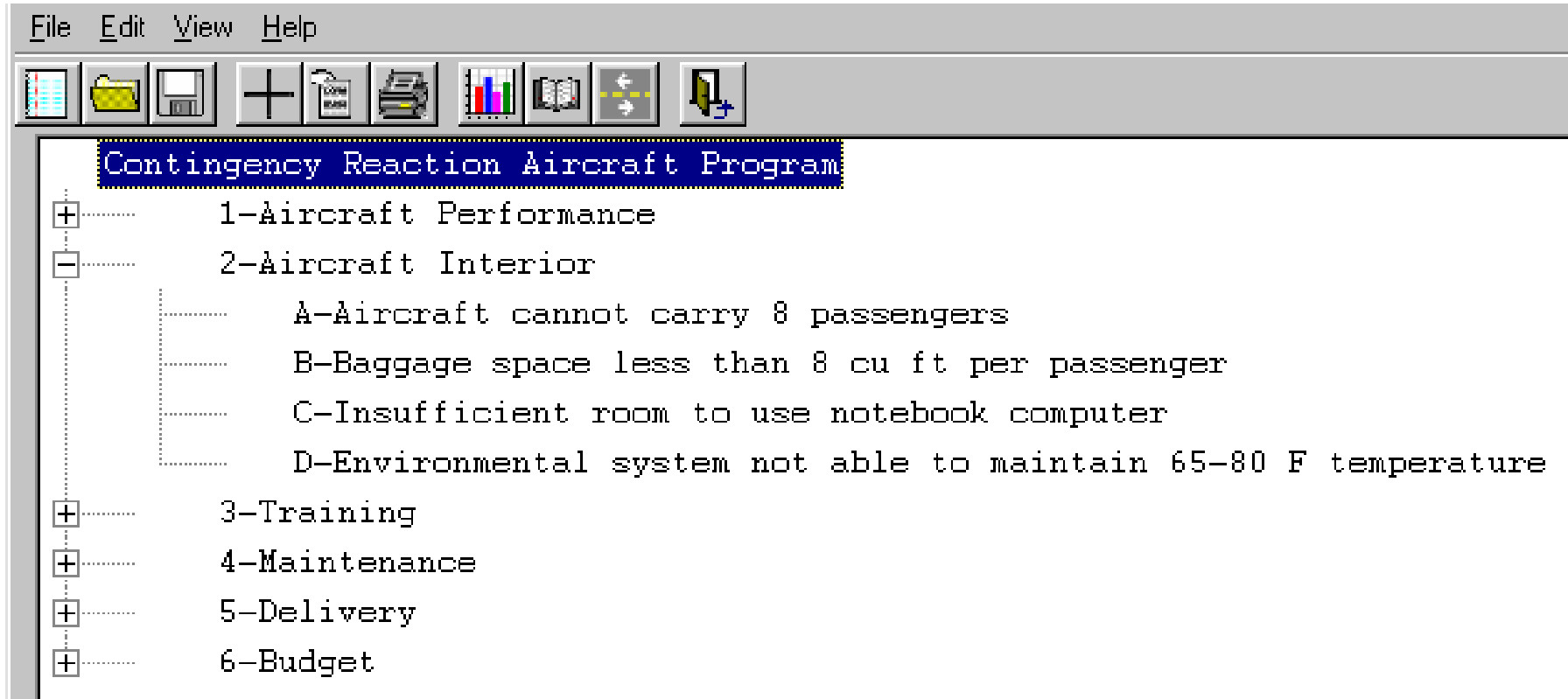
The screenshot shows a software interface with a toolbar at the top containing icons for file operations (list, folder, save, add, print, copy, paste, zoom, etc.). Below the toolbar is a title bar with the text "Contingency Reaction Aircraft Program". The main area displays a hierarchical list of project components. The first component, "1-Aircraft Performance", is expanded and shows five sub-items: "A-Does not cruise at .75 Mach", "B-Cannot fly 2,000 miles at max gross weight", "C-Unable to meet 35,000 ft minimum cruise altitude", "D-Fleet configuration not standard", and "E-Paint application not acceptable". The other components are collapsed and marked with a plus sign: "2-Aircraft Interior", "3-Training", "4-Maintenance", "5-Delivery", and "6-Budget".

Contingency Reaction Aircraft Program

- 1-Aircraft Performance
 - A-Does not cruise at .75 Mach
 - B-Cannot fly 2,000 miles at max gross weight
 - C-Unable to meet 35,000 ft minimum cruise altitude
 - D-Fleet configuration not standard
 - E-Paint application not acceptable
- + 2-Aircraft Interior
- + 3-Training
- + 4-Maintenance
- + 5-Delivery
- + 6-Budget

Note: Negative risk statements

Aircraft Interior Risks



Assign Risk Levels

	NEGLIGIBLE	MINOR	MODERATE	SERIOUS	CRITICAL
Level 5: 91 - 100%					
Level 4: 61 - 90%		C4C	S5C	P2C, P2D	S3B, P4C
Level 3: 41 - 60%			C1E		S1E
Level 2: 11 - 40%			P1C, C4A, C4D, C6A, C6B	P1D, P2B, P4B, S5B	P1A, P1B, S5A
Level 1: 0 - 10%				P3A	P2A

Low Risk

Moderate Risk

High Risk

High Risk Elements

Level 4, Critical

3B No simulator time available when needed

4C Contractor cannot perform remote maintenance

Level 4, Serious

2C Insufficient room to use notebook computer

2D Environmental system not able to maintain 65-80 F tem

Level 3, Critical

1E Paint application not acceptable

Level 2, Critical

1A Does not cruise at .75 Mach

1B Cannot fly 2,000 miles at max gross weight

5A Manufacturing backlog exceeds 14 months

Statement of Objectives For VIP Aircraft

Specific Objective 1 The Government requires an a fleet of six 8 passenger aircraft capable of 2,000 NM sustained flight, .75 M cruise speed, and 35,000 feet operating altitude.

Specific Objective 2 The contractor will be responsible for all scheduled and non-scheduled maintenance, at both Andrews AFB, MD, and deployed locations.

Specific Objective 3 The aircraft must be aesthetically pleasing and sufficiently comfortable to accommodate VIP travel, to include adequate workspace for passengers.

Specific Objective 4 Delivery of at least two aircraft, with contract provided training for two aircrews per plane, is required within months of contract award.

Section M Evaluation Criteria

Mission Capability (MC) Factor

Subfactor A: Aircraft Performance - Aircraft will be evaluated in the areas of cruise speed, range, and altitude to determine its suitability. Strengths may be awarded for exceeding the requirements.

Subfactor B: Utility - In addition to the exterior esthetics, the proposed interior configuration, to include seating, passenger space, climate control(s), and relative human factors considerations, will be assessed. Strengths may be awarded for exceeding the requirements.

Subfactor C: Availability - The proposed maintenance approach, both at Andrews AFB and as deployed, will be evaluated for complying with and or exceeding the required mission capability rate.

Subfactor D: Delivery - The proposed delivery schedule will be assessed against the required 12 month IOC or exceeding the schedule.

Subfactor E: Training - The Government will evaluate the approach to provide pilot training sufficient to meet or exceed SRD requirements.

Other Section M Factors

Proposal Risk - Will be evaluated at the Mission Capability (MC) subfactor level and reported at same.

Past Performance - will be assessed at the Mission Capability (MC) subfactor level and reported at the factor level.

- Always as important as Mission Capability and Proposal Risk

Price/Cost - Will be evaluated at the total cost level, to include aircraft acquisition costs, maintenance costs, and other government costs (OGC) associated with the program over the contract period of performance.

LET'S BUILD SECTION M SUBFACTOR/ELEMENT EVALUATION CRITERIA

“MY TEN STEP APPROACH TO SECTION I”



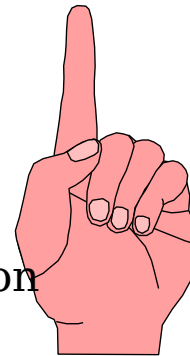
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RFP SECTION M FACTORS (*MEDIAN & AGENCY LEVEL)

STEP 1 List AFFARS PART 5315 FACTORS

- Mission Capability (MC)
 - ✓ SubFactors (suggested max. 6)
 - Derived from logical program and specific segments or elements identified in the Statement of Objectives (SOO)
- Past Performance
- Proposal Risk
- Cost/Price

*No Proposal Risk for Basic level Source Selection



Developing Evaluation Factors

- **Involve all stakeholders (user, industry as appropriate)**
- **Ensure common understanding of requirements**
 - **User objectives must be specifically addressed**
- **High risk items generally included**
 - **Likely events with significant negative impact on program execution**
- **Not everything can be evaluated - not enough resources**
 - **Many requirements are pass/fail only - select KPP/High Risk ones**
 - **Mission Capability subfactors are intended as subset requiring greater scrutiny and offer trade space for evaluation**
- **Should reflect market realities**
 - **To include inherent product/service characteristics found in market research**

Subfactor Attributes

STEP 2 Assign the logical MC subfactors from the SOO

STEP 3 Brainstorm attributes for each subfactor such as:

- Activities (e.g., repair level analysis)
- Tasks (e.g., Tech Order validation)
- Functions (e.g., integrate ILS process into Systems Engineering)
- Outputs (e.g. LMI data products and summaries)
- Products (e.g., Engineering Tech Data)
- Services (e.g., Total Contract Training)

STEP 4 Assign performance/capability requirements to subfactor attribute(s) such as:

- High Risk
- High Value
- KPPs

STEP 5 Find “discriminators” for each selected requirement

What are Source Selection “Discriminators?”

Factors...subfactors, and elements ... “They establish the level an offeror’s proposal shall meet in order to be judged acceptable. **Factors and subfactors shall be limited to those that are real discriminators**” AFFARS 5315.304 (b)

- Use proposal evaluation discriminators to:
 - Mark or perceive aspects of proposals with distinguished or peculiar features
- Discern or expose differences from minimum requirements
 - Make a distinction between minimum requirements and proposed capability or level of performance
 - Measure qualitative and quantitative trade space between thresholds and objectives



Brainstorm for Subfactor Discriminators

- What are proposal aspects that can offer best value in these ways?
 - Key Measures of Merit
 - Key Measures of Performance
 - Key Measures of Effectiveness
- What are proposal features that can enhance or extend performance or capability requirements?
- What are the high-value requirements that can offer trade space?

Brainstorm For Subfactor “Discriminators”

- Which requirements are the most difficult to achieve?
- What requirements provide the highest payoff?
- What are risk mitigation opportunities?
- What are options to control/manage risks?

Best Value Trade-off in AFFARS 5

Discriminators allow for Trade Space

Trades exist between Factors -- MC vs.
Proposal Risk vs. Past Performance vs.
Price/Cost

Trades exist between Subfactors --
Subfactor vs. Other Subfactors

Trades exists between Threshold
Requirements vs. Objectives

Trades exist between Performance
Requirements vs. Capability Requirements

Trade Space is Key to Discriminators

Performance
Threshold



“Below Threshold”
(deficient)



Performance
Objective (max.)



“Trade Off”
(deficient)



Writing Subfactor Evaluation Criteria

STEP 6 List Or identify KPP threshold requirements that merit critical evaluation by the Source Selection Evaluation Team (SSET)

- Identify any Key Go/No Criteria (Pass/Fail)

STEP 7 Transform evaluation discriminators into narrative statements for each subfactor to indicate trade space for best value consideration

STEP 8 Prioritize and logically organize in Section M

Subfactor Evaluation Criteria Formats

Alternate 1 -- Release only **Threshold** criteria and permit the offerors to propose features of proposal that exceed requirements to provide consideration for Best Value;

Alternate 2 -- Release **Threshold** and **Objective** criteria clearly advise offerors that credit for exceeding Thresholds or Objectives may be considered; or

Alternate 3 -- Release **Threshold** and **Objective** criteria and advise offerors that AF reserves the right grant credit for exceeding **Thresholds**, but not for exceeding **Objectives**.

“Wire Brush Questions”

STEP 9

Questions to ask during attribute & criteria development:

- What are the attributes of a “successful approach” for this subfactor or criteria?
- What’s the difference between a good approach and a bad one?
- What kind of approach would not meet requirement?
- Do we expect to get different kinds of proposal responses from the potential offerors or will they all be the same (textbook) answer?
- Can the offeror exceed our criteria? How?
- Is there really a benefit to the Air Force if a response exceeds our requirement/criteria?

Start Section L

STEP 10 Start Section L development

- **Transform the Section M (evaluation criteria) into Section L paragraphs**
 - **Use factors, subfactors, criteria items (discriminators) as an outline**
 - **Identify what aspects of the performance, capability, and solicitation requirements are to be placed in the Section L**
 - **Tell offerors what must be contained in proposal**
 - **Develop the narrative and background sections for the Section L**
 - ✓ **What the SSET plans to evaluate must match what the SSET expects the offerors to propose.**
 - **Provide Integrated Master Plan (IMP) instructions**

Examples of RFP Language

RISK ASSESSMENT

Notional ILS Risks by Requirements Groups

READINESS

The risk that the absence of timely depot capability will compromise operational readiness.

TECHNOLOGY:

The risk associated with the absence of technological knowledge and awareness. Services must maintain capability to understand, master and support current technology.

SUPPORTABILITY:

The risk that the industrial base will not have sufficient depot level contingencies and capabilities to ensure that mission essential

SOO Example

A Fictitious Program

- The JMISS program focus is an affordable tactical strike missile weapon system for the USN, USAF, and RAF. The principal objectives for the JMISS Technology Development Phase leading to DoDI 5000.2 Milestone B review are:

- (1) demonstrate those critical technologies, processes, and system characteristics that risk assessments have shown are necessary to enter System Development and Demonstration with acceptable, manageable risk**
- (2) define a Tri-Service Preferred Weapon Concept (PWSC) using performance-based acquisition tenets as the primary drivers for development of performance requirements**
- (3) document the planned *sustainment and support* structure and required resources**
- (4) develop and implement streamlined internal management and control processes that**

Section M Content -- (ILS Criteria)

Section M

An example of an opening paragraph of a Subfactor or an Element...

The offeror provides evidence of a sound plan to implement Integrated Logistics Support processes that demonstrates to the Government an understanding of all user sustainment and supportability requirements contained in the ICD/CDD and CONOPS and prioritized in the SOO, SRD/TRD, and Section L instructions. The offeror must demonstrate in the proposal how it plans transform those user performance-based requirements into an affordable and supportable ground and space system, including documenting all related resources that will

ILS Criteria (Discriminator No. 1)

The offeror provides a comprehensive plan for refining the overall logistics strategy that includes consideration for integration of commercial off-the-shelf items, logical and affordable maintenance support, other Integrated Logistics Support elements, and planned determination of final logistics products to meet or exceed established SRD performance-based, event requirements.

ILS Criteria (Discriminator No. 2)

The offeror provides sufficient or significant evidence in proposal of designing system supportability through concurrent engineering and logistic support analysis to ensure long-term cost-effective system sustainment.

ILS Criteria (Discriminator No. 3)

The offeror presents a sound understanding of logistics requirements by: (1) thoroughly describing the exceptional features and products of the offeror's logistic support analysis processes; (2) while incorporating logistics considerations in the system design; and (3) that includes development of initial training analysis and comprehensive engineering data

ILS Narrative in Section L

SECTION L-3 An Example Narrative

Propose an Integrated Logistics Support (ILS) planning program that will identify and transform user requirements into a supportable system. It should identify the system support resources analysis is needed to provide a cost-effective system sustainment effort. Describe the proposed management and technical approach needed to develop, design, and deliver logistics support assets/products to meet required operations capability. Include any planning of logistics support that may be required to sustain elements associated with any impacts to the ground and space segments identified. Specific instruction as follows...

Specific ILS Proposal

Instructions

Section L-3

A Specific Example

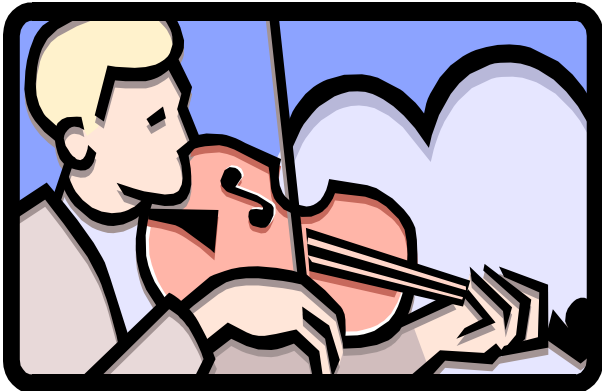
- a. Explain proposed approach for interfacing and integrating the performance-based logistics support design into the existing DoD logistics infrastructure.
- b. Identify studies to develop training equipment and training courses.
- c. Describe plans for the technical manual development program.
- d. Determine how fault detection and fault isolation will be developed and implemented.
- e. Layout planning for the maintenance concept and supply support concept for the ground equipment.
- f. Provide plan for post-production support and maintenance of software and unique resources and technical data.
- g. Show how the offeror's proposal will consider all logistics elements and their interaction, and then determine their risk areas.
- h. Justify analysis for numbers and skill levels to operate and maintain the proposed system.

RFP Development Summary

- Stay Focused on the “Real Discriminators”
- Prevent all Technical Parameters from Getting Combined into 1 or 2 Subfactors
- If you Must Address Processes, Focus on the High Risks Within each Process
- Use “Top-down “ Approach
- Get Buy In from IPT and then go to Industry for input
- Resist writing too soon before brainstorming complete

Source Selection Overview

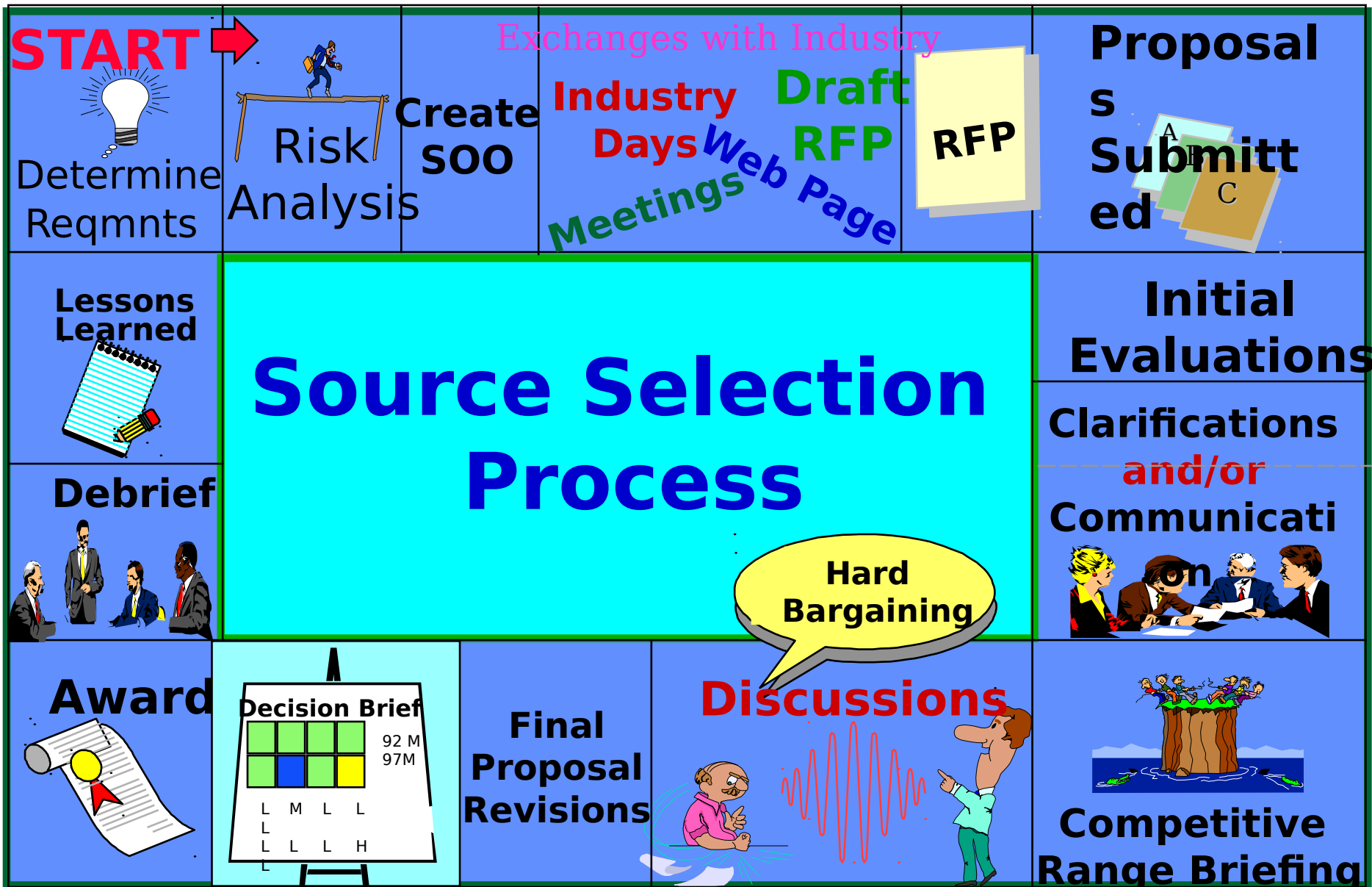
*An Art
or
Systematic Process?*



Overview Part 3

- **Big Picture View**
- **Source Selection Objective and Organization**
- **Evaluators and Advisors Tasks**
- **Preparation and Planning**
- **Steps in the Source Selection Process**
- **Feedback**

AF Source Selection



Source Selection Objective

“The objective of Source Selection is to select the proposal that represents the ***Best Value***”

FAR 15.302

Best Value: “The expected outcome of an acquisition that, in the Government’s estimation, provides the greatest overall benefit in response to the requirement.”

FAR 2.101

Evaluators and Advisors

- **Evaluators & Advisors (Government & Non-Government):_**
 - **Non-Government Evaluators/Advisors must be identified in the Source Selection Plan (SSP)**
 - **FFRDC can perform as MC/PR Evaluators /Advisors and PRAG Advisors**
 - **Contractor personnel can be MC/PR Evaluators/Advisors only if their contract allows them to perform these duties or there is an approved Determination/ Decision Document* (DDD)**
 - ✓ POC: J.A. Taniguchi SMC/AXC
 - **Do not determine final ratings or assign rankings of proposal**
- **Staff Advisors:**
 - **AXD, PKC, and JAG, Aerospace personnel from **SMC Staff** that review products and provide advice to source selection teams**
*****All SMC/AXL Advisors must listed in the SSP*****

****SAF/AQX Memo and Policy 23 Jul 01, Subject: Air Force Advisory & Assistance Services.***

Planning and Preparation

1. Read key RFP documents
 - Government Executive Summary
 - SOO
 - RFP Sections A-K, especially:
 - ✓ SRD/TRD (Section C, if used)
 - ✓ Delivery schedule (Section F)
 - ✓ Special Contract Requirements (Section H)
 - WBS and WBS Dictionary
 - Performance Based SOW (if used)
 - CDRL (DIDs)
2. Read the Source Selection Plan (SSP) and Source Selection Evaluation Guide (SSEG) (If Used)

Planning and Preparation

3. Read *Section L* - Instructions, Conditions, and Notices to Offerors or Quoters
 - Review proposal structure table
 - Specifications and TRD/SRD
 - P-SOW (if used) or CSOW Instructions in Section L
 - IMP/IMS Instructions
 - Cost/Price Instructions
4. Study *Section M* - Evaluation Factors/Criteria for Award
 - Understand RFP threshold/objectives (if used)
 - Understand how criteria relate to TRD/SRD Trade Space
 - Understand the uniform baseline against which each offeror is compared
5. Understand RFP/Proposal/Contract Document Linkage

Source Selection Factors

Mandatory for Agency/Median SS

- **Mission Capability (MC)**

- Programmatic, Performance, and Business Aspects
 - ✓ Assessment of **how well** Offeror's proposal meets and exceeds RFP requirements

- **Proposal Risk (PR)**

Indicator of an Offeror's ability to execute the program within the proposed cost schedule, and performance baselines

- ✓ Assessment of Offeror's **approach** in meeting/exceeding requirements

- **Past Performance**

Historical evidence of recent and relevant contract performance

- **Price/Cost**

Most likely cost to the Government to perform proposed effort at contract completion

Each Factor uses a different evaluation process and definitions.

Personal Implications



Personal Implications (cont.)

“The power of collecting and disbursing money at pleasure is the most dangerous power that can be entrusted to man, particularly under our system of collecting revenue....”

Public Monies and Private Supplications, by
Davy Crockett

“Public monies should be touched only with the utmost conscientiousness of honor....”

Common Sense, by Thomas Paine 91

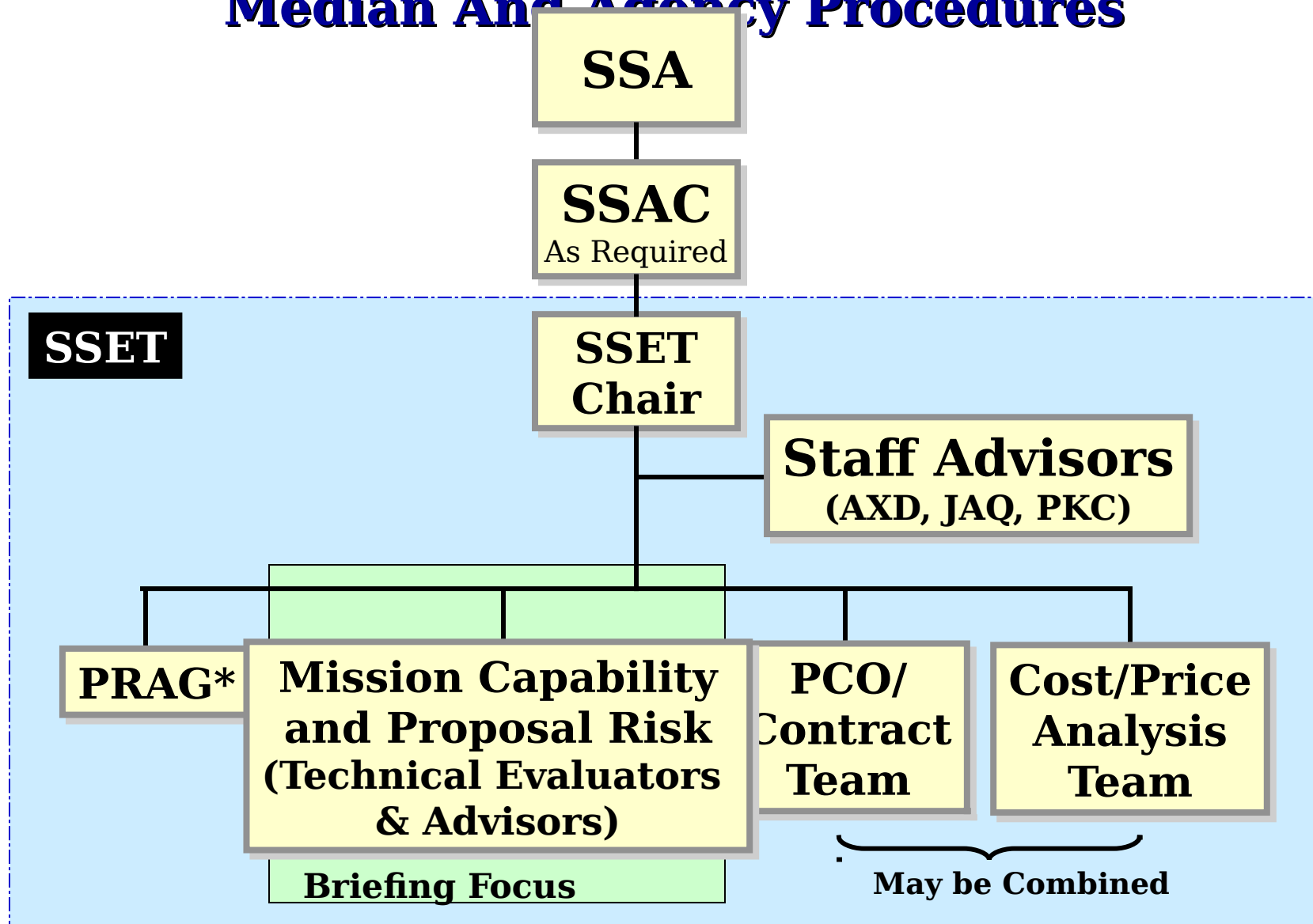
***Please fill out your feedback
forms, and
Call AXD if you have questions!***

Source Selection

Back-Up Charts

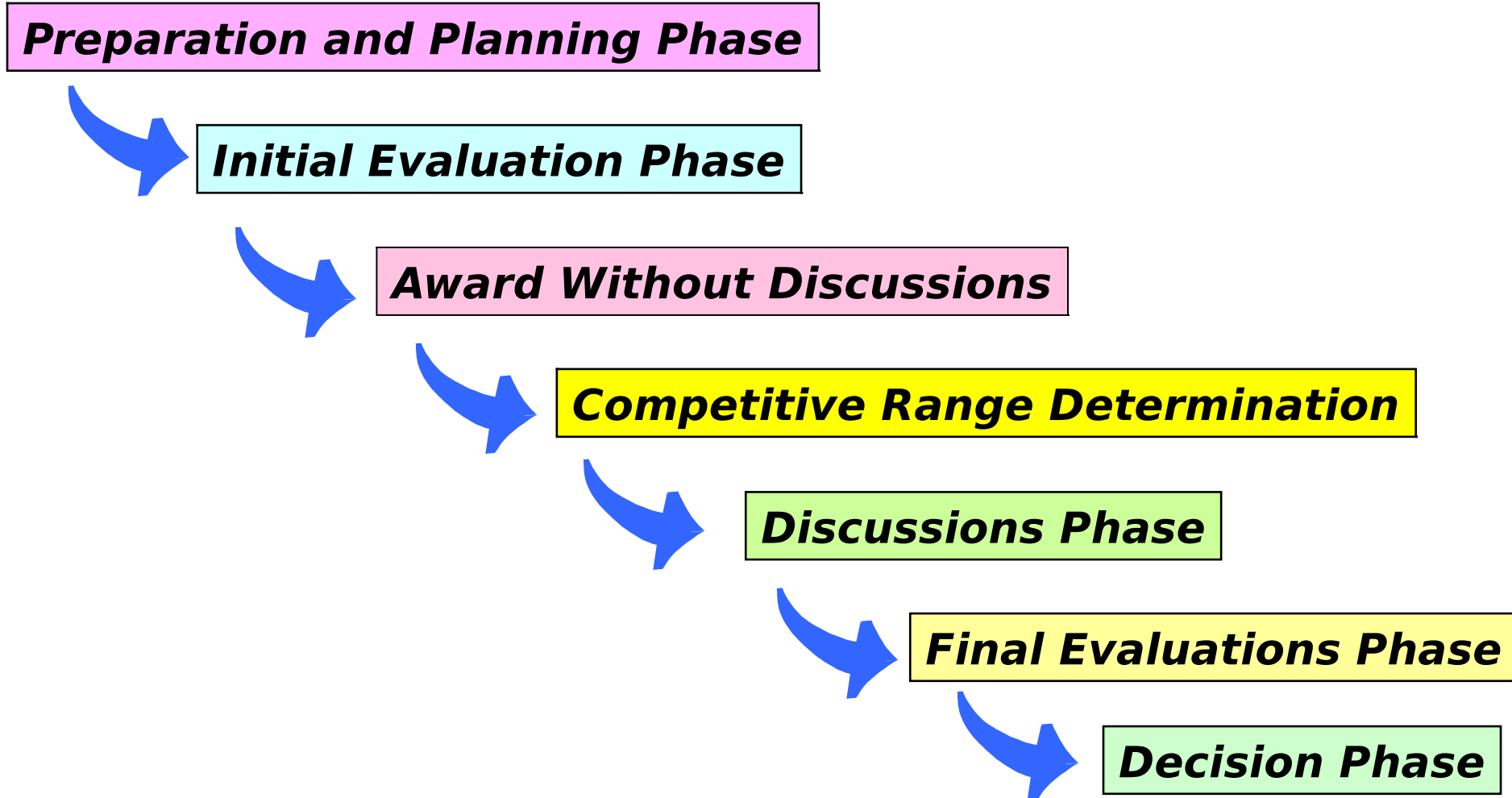
Source Selection Organization

Median And Agency Procedures

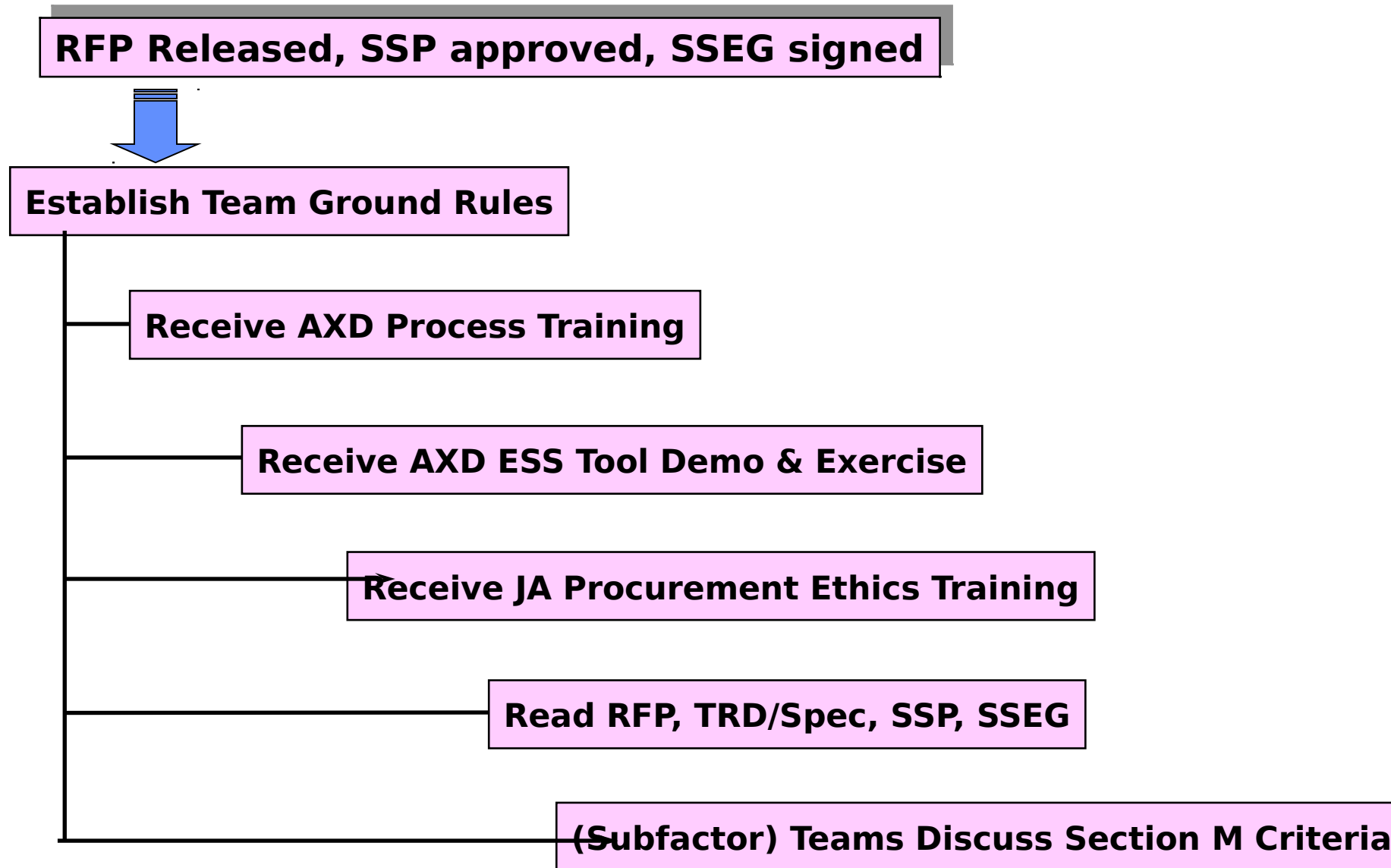


* Use of PRAG to evaluate Performance Confidence is optional for Median Acquisitions

Source Selection Process Overview



Preparation and Planning



Proposal Risk Assessment Defined

AFFARS 5315.305 (a)(3)(B)

“**Proposal risk** assessment focuses on the risks and weaknesses associated with an offeror’s proposed approach. Assessment of risk is done at the sub-factor (or element, if used) level, and includes potential for disruption of schedule, increased cost, degradation of performance and the need for increased Government oversight as well as the likelihood of unsuccessful contract performance. For any risk identified, the evaluation must address the offeror’s proposal for mitigating those risks and why that approach is or is not manageable....” *[emphasis added]*

Past Performance Process

Obtain Past Performance Information on Each Offeror

Assess Contract Relevancy & Recency for Each Subfactor

Assess Contract Performance for Each Subfactor (M Criteria)

Review Relevancy/Recency and Performance Ratings

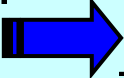
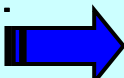
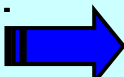
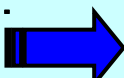
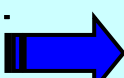
Assign Confidence Ratings to Each of the MC Subfactor Areas

Recommend PAST PERFORMANCE FACTOR Confidence Rating

MC & PR: THE DIFFERENCES

	MISSION CAPABILITY	PROPOSAL RISK
FOCUS	DOES THE PROMISED PERFORMANCE MEET THE SOLICITATION REQUIREMENTS ?	WHAT ARE THE RISKS OF MEETING SOLICITATION RQMTS IF PERFORMED AS PROMISED?
ISSUE	WHAT IS QUALITY OF PERFORMANCE-BASED OUTCOME ?	WHAT RISKS ARE INHERENT IN OFFEROR'S APPROACH ?
ASSESSMENT	(MEETS) STRENGTH PROPOSAL INADEQUACY MC DEFICIENCY	(NO WEAKNESSES) WEAKNESS SIGNIFICANT WEAKNESS PR DEFICIENCY
RATING	BLUE GREEN YELLOW RED	LOW MODERATE HIGH

Proposal Risk “Thought Process”

Key Aspects of Proposal Risk	Sources of Proposal Information
Disruption of Schedule	 Integrated Master Schedule (IMS)
Increased Cost	 Cost Volume or Manpower Tables
Degradation of Performance	 MC Volume => proposed approach
Offeror’s Risk Mitigation (Plans)	 Mitigation Plans in MC Volume,
Need for Increased Gov’t Oversight	 if requested Likelihood of Oversight (result of evaluation)

Cost/Price Definitions

(FAR 15.305(a)(i))

- **Cost/Price Reasonableness**

Normally evaluated and assessed under price competition; may also be determined by other price analysis techniques such as parametric analysis

- **Cost Realism**

Required for cost-reimbursement contracts, an assessment that proposed price appropriately considers scope and degree of effort. As elected by PCO, may be considered for other contract types such as FPIF

- **Probable Cost**

SSET's estimate of cost to the Government at contract completion.

Comment Form

Comment

Member: Offeror: Proposal:

Factor: Subfactor: Element: Criteria:

Comments | Related Asmts | Related ENs

☒ Reviewed By:

Status	Author	Date/Time created	Cmt ID
Submitted	ESSAdmin	23-Feb-00 15:27	1

RFP Ref:

Proposal Ref:

Bullet **Suggested**

Narrative

Requirement States: hull able to sustain xxx pressure

Offeror Stated: hull design comprise of abc material which will sustain 2xxx

Comment: offeror proposes a hull material design that will sustain two times

Effect/Benefit: hull integrity increased

Suggested EN language:

Record: of 4

Disposition

COMMENTS

Selector	Defs	Criteria
	Asmt	EN

View:

Filter is **OFF**

Buffer

*** Read-Only ***

Reviewed by another user.

Asmts:

ENs:

Assessment Form

Assessment

Member

essadmin

Offeror

Alpha Beta

Proposal

Primary

Factor

Mission Capability

Subfactor

Technical

Element

Space Vehicle

Criteria

1.1.1

Assessments

Related Comments

Related ENs

Asmt Type

Strength

Status

Open

Author

ESSAdmin

D/T created

23-Feb-00 15:37

Asmt ID

1

EC

SFC

FC

PCO

SSET

SSA

RFP Ref

sec m, page 1

Proposal Ref

tech vol, page 4

Level

**

Briefing Bullet

hull design more than adequate

Narrative

Requirement States: hull able to sustain xxx pressure

Offeror Stated: hull design comprise of abc material which will sustain 2xxx pressure

Comment: offeror proposes a hull material design that will sustain two times the desire pressure

Effect/Benefit: hull integrity increased

Suggested EN language:

Record:

1

of 2

Disposition

Assessments

Selector

Defs

Criteria

Cmt

EN

New

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Apply Filter

Filter is

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Copy

Paste

View

Comments:

1

Link

Del

ENs:

Link

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Evaluation Notice Form

Evaluation Notice

Member: Offeror: Proposal:

Factor: Subfactor: Element: Criteria: **1**

ENs | Related Comments | Related Assessments

2

EN Type	Category	Author	D/T created	EN ID	
Communication	Deficiency	ESSAdmin	23-Feb-00 15:45	1	☐ EC ☒ SFC ☒ FC ☐ PCO ☐ SSET ☒ SSA

RFP Ref:

Prop Ref:

3

Topic: Status:

4

Narrative

Requirement States: propulsion at xxx or greater
 Offeror Stated: at most vehicle has xxx-2.5

Comment: offeror proposes a value of 2.5 less than the desired propulsion
 Effect/Benefit: not enough propulsion to reach desired orbit

Suggested EN language:

Record: of 2

Disposition

ENs

Selector | Defs | Criteria
 Cmt | Asmt

New | Move

View:
 Apply Filter
 Filter is **OFF**

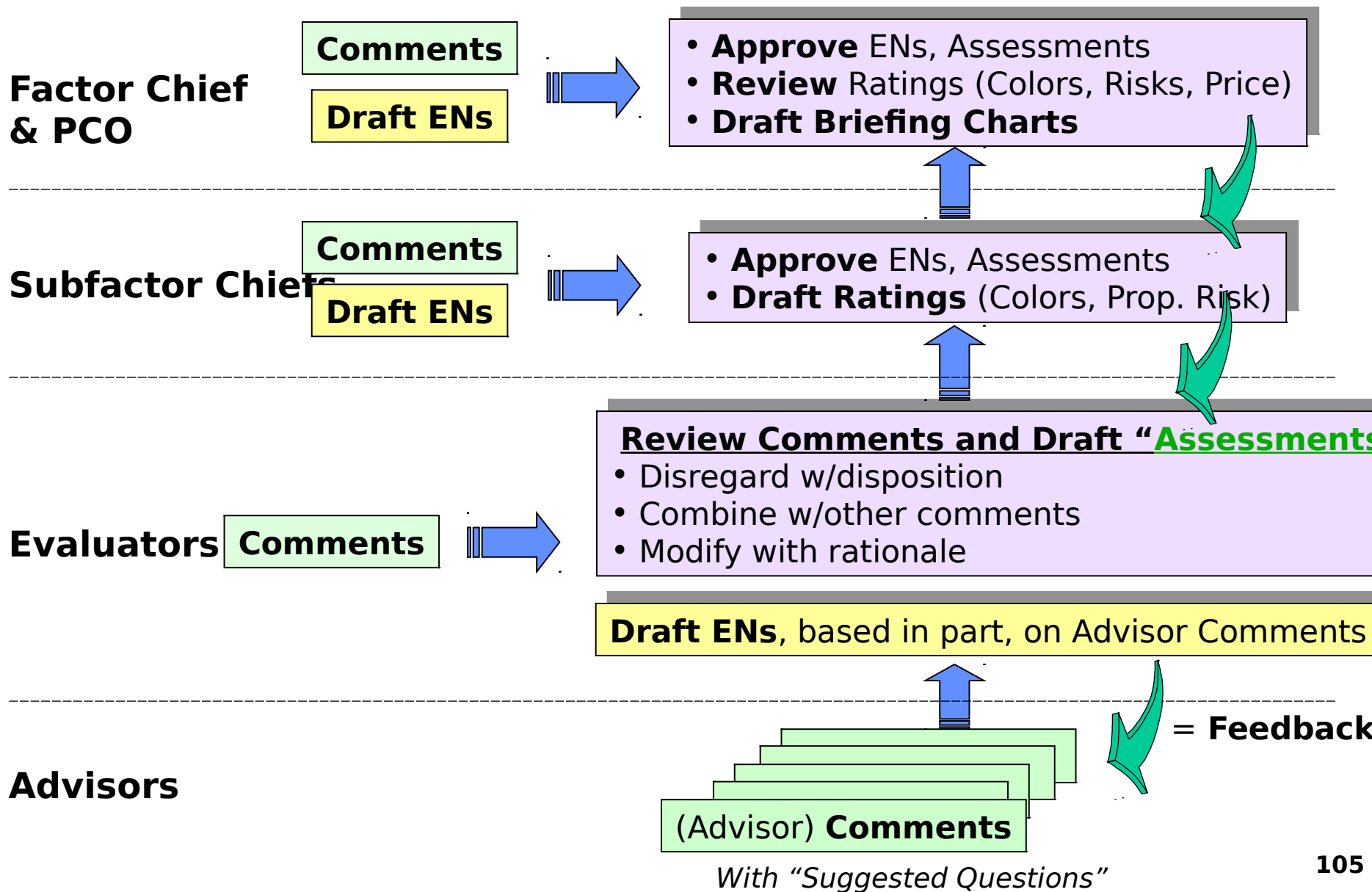
Buffer

Copy | Paste | View

Comments: Asmts:

Link Del Link Del

“Rollup”



Integrating the Ratings

Core Team: SSET Chair, Factor Chiefs, Sub-Factor Chiefs, PCO, Recorder

